

ROUTLEDGE



GLOBAL RESTRUCTURING, LABOUR AND THE CHALLENGES FOR TRANSNATIONAL SOLIDARITY

Edited by Andreas Bieler
and Ingemar Lindberg

RETHINKING
Globalizations







RETHINKING *Globalizations*

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GLOBAL RESTRUCTURING, LABOUR AND THE CHALLENGES FOR TRANSNATIONAL SOLIDARITY

Edited by Andreas Bieler and Ingemar Lindberg

"Liberation from the neo-liberal straight-jacket of uncontrolled global economic power is impossible without the collective strength of working people. However, labour has to change in order to effect change. This carefully edited book provides an excellent analysis of the formidable challenges a progressive labour agenda is facing. A must read for those who are concerned about global social justice and democratic self-determination."

Frank Hoffer, ILO Bureau for Workers' Activities

"Rich in contextual evidence, this book explains how globalizing processes elicit different responses from workers and beget varied outcomes. Bieler and Lindberg deftly weave together several case studies, showing obstacles and strategic possibilities for trade unions. Their analysis is a breakthrough in coming to grips with the nexus of globalization and social movements."

James H. Mittelman, University Professor of International Affairs, American University

"Bieler and Lindberg have brought together a great group of scholars and activists to address some of the most intractable issues in our current complex global modernity. Prominent among these are what it means to organize in today's global economy and what are the new bases for solidarity when the space for politics cuts across the world. The many different perspectives in this book move us towards drawing this different type of map."

Saskia Sassen, Professor, Columbia University and author of *Territory, Authority, Rights*

Globalisation has put national labour movements under severe pressure due to the increasing transnationalisation of production and informalisation of the economy.

Through a range of different case studies of concrete instances of successful as well as failed strategies, this book draws out possibilities of, but also obstacles to, transnational labour solidarity in times of global restructuring. It covers inter-trade union co-operation as well as co-operation between trade unions and social movements within the formal and informal economy, and the public and private sector.

This book will be of interest to students and scholars of International Political Economy, International Relations, Industrial Relations, Globalisation, Geography and History, as well as trade union researchers and social movement activists.

Andreas Bieler is Professor of Political Economy at the University of Nottingham.

Ingemar Lindberg has worked as a researcher at the Confederation of Swedish trade unions (LO) and has also served

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Abbreviations

AFW	Asian Floor Wage campaign
ALaRM	Apparel-industry Labour Rights Movement
ANC	African National Congress (South Africa)
ASSOTSI	Associação dos Operadores e Trabalhadores do Sector Informal (Association of Workers and Operators of the Informal Sector)
Attac	Association pour la Taxation des Transactions Financiers pour l'Aide aux Citoyens
BOI	Board of Investments (Sri Lanka)
CAW	Canadian Auto Workers
CCC	Clean Clothes Campaign
CEE	Central-Eastern Europe(an)
CEEP	European Centre of Enterprises with Public Participation and of Enterprises of General Economic Interest
CGT	Confederation General du Travail (France)
COSATU	Congress of South African Trade Unions
CSR	corporate social responsibility
ECJ	European Court of Justice
ECOWAS	Economic Community of West African States
EDC	Ericsson de Colombia
EDF	European Disability Forum
EEA	European Economic Area
EEB	European Environmental Bureau
EFBWW	European Federation of Building and Woodworkers
EMCEF	European Mine, Chemical and Energy Workers' Federation
EMF	European Metalworkers' Federation
EMU	Economic and Monetary Union (EU)
EP	European Parliament
EPSU	European Federation of Public Service Trade Unions
EU	European Union
ETF	European Transport Workers' Federation
ETUC	European Trade Union Confederation
EWC	European Works Council

FDI	foreign direct investment
FENASICOCH	Federación Nacional de Sindicatos de Conductores de Buses, Camiones, Actividades Afines y Conexas de Chile
FLA	Fair Labour Association
FMC	Fresenius Medical Care
FTZ	free trade zones
FTZGWU	Free Trade Zone and General Workers' Union (Sri Lanka)
GATS	General Agreement on Trade in Services
GCC	global commodity chains
GM	General Motors
GSP	Generalized System of Preferences (EU)
HRM	human resource management
IBT	International Brotherhood of Teamsters (US)
ICEM	International Federation of Chemical, Energy, Mine and General Workers' Union
ICFTU	International Confederation of Free Trade Unions, now in ITUC
ICT	information and communications technologies
IG BAU	German Construction Workers' Union
IG BCE	German Chemical, Mining and Energy Industrial Union
ILO	International Labour Organization
IMF	International Metal Workers' Federation <i>or</i> International Monetary Fund
IR	industrial relations
ITF	International Transport Workers' Federation
ITGLWF	International Textile, Garment and Leather Workers' Federation
ITUC	International Trade Union Confederation
IUF	International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations
LO	Landsorganisasjonen (Confederation of Trade Unions) (Norway, Sweden)
MEP	Member of European Parliament
MERCOSUR	Mercado Común del Sur (Common Market of the Southern Cone of Latin America)
Metall	Svenska Metallindustriarbetareförbundet (Swedish Metalworkers' Union, now IF Metall)
MNC	multinational corporation
MFA	Multi-Fibre Agreement
MLSS	Ministry of Labour and Social Security (Turkey)
NGO	non-government organization
OPZZ	Ogólnopolskie Porozumienie Związków Zawodowych (All-Poland Alliance of Trade Unions)
Petrol-İş	Petroleum, Chemical and Rubber Workers' Union of Turkey

PPP\$	purchasing power parity in US\$
RSU	Rappresentenza Sindacale Unitaria (Italy)
SEIU	Service Employees International Union (US)
SIF	Svenska Industritjänstemannaförbundet (Swedish Union of Clerical and Technical Employees in Industry, now Unionen)
SIGTUR	Southern Initiative on Globalization and Trade Union Rights
SINAMEQUIPH	Sindicato Nacional de Motoristas de Equipo Pesado de Honduras
<i>Sintraericsson</i>	Sindicato de Trabajadores de Ericsson de Colombia
SL	Second Life
STISSS	Sindicato de Trabajadores del Instituto Salvadoreño del Seguro Social
TAC	Treatment Action Campaign (South Africa)
TAN	Transnational Advocacy Network
TNC	transnational corporation
TRIPS	Trade-Related Aspects of the Intellectual Property Rights (TRIPS) accord
TUC	Trades Union Congress (UK)
Türk-İş	Confederation of Turkish Trade Unions
UFW	United Farm Workers (US)
UK	United Kingdom
UNI	Union Network International
UNRISD	United Nations Research Institute for Social Development
UPS	United Parcel Service
WSF	World Social Forum
WTO	World Trade Organization
ZNP	Związek Nauczycielstwa Polskiego (Polish Teachers' Union)

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Part I

**Introduction and
conceptual considerations**

1 Globalisation and the new challenges for transnational solidarity

An introduction

Andreas Bieler and Ingemar Lindberg

Introduction

Since the early 1970s, globalisation has drastically changed the landscape of international political economy. Its definition is heavily discussed, but generally the increasing transnationalisation of a range of production sectors, the emergence of an integrated global financial market as well as the establishment of neo-liberal economics as a new dominant economic consensus can be identified as its core characteristics. We can, therefore, also speak of neo-liberal globalisation. As such, global restructuring has not fulfilled its promises for world-wide development and better living conditions for all. While overall global gross domestic product (GDP) has increased over the last decades, the general inequality within and between countries has grown. The Gini coefficient, which ranges from 0 (perfect equality) to 100 (complete inequality) indicates that global inequality rose steadily from 43 in 1980 to 67 in 2005 (Bieler *et al.*, 2008b: 10). Moreover, 'for most of the world, economic growth was much slower in the 1980s and 1990s, when the pace of globalisation quickened, than in the 1960s and 1970s' (War on Want, 2009: 4). This is also reflected in higher unemployment levels. 'The number of people unemployed and the number in unstable, insecure jobs has actually increased – from 141 million to 190 million (1993 to 2007) and from 1,338 million to 1,485 million (1997 to 2007) respectively' (War on Want, 2009: 4). Unsurprisingly, we have experienced a growing level of contestation of globalisation since the late 1990s starting with the large-scale protests at the World Trade Organization (WTO) meeting in Seattle in 1999 and embodied in the regular meetings of the World Social Forum (WSF), as well as a whole range of regional and national meetings within the social forum process. At the core of these moments of contestation is a variety of trade unions as well as a wide range of different types of social movements.

Whether these movements of resistance against neo-liberal globalisation and in favour of another globalisation are successful will also depend very much on whether it will be possible to move towards transnational solidarity. In a previous volume (Bieler *et al.*, 2008a), we concentrated on the analysis of several national labour movements and their positions on, and strategies to, globalisation. This also included an assessment of trade unions within the regional African and European as

well as international context. This volume builds on these analyses, but also goes beyond them in that it shifts the focus towards concrete instances of successful as well as failed attempts to establish transnational solidarity. As Gajewska (2009: 15) correctly points out, country case studies often reveal especially differences between various national labour movements, which seem to make cooperation across borders impossible. A focus on cases of transnational solidarity, by contrast, allows us to reflect on the necessary conditions of solidarity between different national labour movements in a much more constructive way. In short, the goal of this volume is to draw out possibilities but also obstacles to transnational solidarity in times of global restructuring. Our volume is in line with the objectives of previous volumes in this area (e.g. Bronfenbrenner, 2007; Novelli and Ferus-Comelo, 2009a; Munck, 2004; Taylor, 2008a; for an overview of the wider literature in this area, see Taylor, 2009). Additionally, the purpose of this volume is to bridge the divide between academic work and trade union and social movement activism. Hence, the contributors to this volume include not only labour academics, but also trade unionists and social movement activists. The hope is that this ensures that the discussions are theoretically informed while at the same time related to, and meaningful for, concrete developments and struggles. In the first section of this introduction, we will summarise the challenges of globalisation for trade unions and social movements. Then we will discuss the possible agency of trade unions and social movements, before analysing the wider structural dynamics of the capitalist social relations of production, within which these agents operate. The final part will provide an overview of the structure of the book.

Challenges of globalisation for trade unions and social movements

Several key developments can be related to globalisation from the perspective of labour movements. Importantly, although these developments are often of a transnational nature, the precise way they impact on different groups of people, production sectors and countries differs drastically. Hence, while we outline some general structural tendencies of globalisation here, the concrete experience of these changes differ in line with completely diverse impacts around the world (Novelli and Ferus-Comelo, 2009b). First, globalisation has led to an increasing transnationalisation of production, with the production of many goods being organised across borders. Outflows of foreign direct investment (FDI) rose from US\$ 88 billion in 1986 to US\$ 1187 billion in 2000 as peak year (Bieler, 2006: 50). A period of recession led to a decline in FDI flows from 2001 to 2003, but four years of consecutive growth led to a new all-time high of FDI outflows of US\$ 1996.5 billion in 2007 (UN, 2008: 253). Overall, there were 78817 transnational corporations (TNCs) with 794,894 foreign affiliates in 2007 (UN, 2008: 212). Robinson additionally highlights 'the phenomenal increase in cross-border mergers and acquisitions; the increasing transnational interlocking of boards of directorates; the increasingly transnational ownership of capital shares; the spread of cross-border strategic alliances of all sorts; and the increasing salience of transnational peak

business associations' (Robinson, 2008a: 30). As a result, workers in different countries and varying national contexts, both in the North and in the South, are brought into competition with each other in these transnational production sectors. Often unions locally at factory level and nationally in central negotiations are confronted with the threat that unless they agree on concessions, employers will transfer production units and jobs to locations with lower labour costs. 'All over the globe these increased possibilities of relocation, and the threat to relocate, are creating widespread risks of underbidding, where workers are forced to press down each others' wages and working conditions in face of risking losing their jobs' (Bieler *et al.*, 2008c: 272). Even within Europe, an intensification of this kind of competition can be noticed, as labour costs are considerably lower in Eastern Europe than in Western Europe. The difficulties for trade unions as representatives of workers are clear. Historically, labour movements emerged within developed countries and obtained considerable power especially in the post-war era. They were to a large extent able to fulfil their main function of organising a monopoly of labour, ensuring common national wage levels for industrial sectors through collective bargaining with employers' associations backed up by strikes if necessary. This prevented workers from competing with each other through lower wages. With production increasingly organised across borders, the national structures of labour movements are no longer adequate to fulfil this function. Hence, the increasing danger of workers competing with each other over jobs on a global scale through offering lower wages and concessions in the area of work-related costs.

Second, the increasing transnationalisation of production, which implies a 'centralization of command and control of the global economy in transnational capital' (Robinson, 2004: 15), has gone hand-in-hand with an increasing decentralisation and fragmentation of the production process itself. Novel forms of the organisation of production such as 'Just-In-Time' and small-batch production, subcontracting, outsourcing as well as formal and informal transnational business alliances have implied that 'different phases of production become broken down into component phases that are detachable and can be dispersed around the world' (Robinson, 2004: 17). While it was initially the labour intensive parts of production, which were outsourced to developing countries, since about 2000 there has also been a move towards outsourcing white-collar jobs to emerging markets such as India (Gereffi, 2006: 10–16). As a result of these processes of transnational outsourcing, a strategy of vertical disintegration by TNCs can be noted. They 'are redefining their core competencies to focus on innovation and product strategy, marketing, and the highest value-added segments of manufacturing and services, while reducing their direct ownership over "non-core" functions such as generic services and volume production' (Gereffi *et al.*, 2005: 79). Thus, transnational production, under the direction of TNCs, is increasingly organised in global commodity chains (Robinson, 2008a: 27). The concept of global commodity chains (GCC) can provide a useful tool for understanding the present-day organisation of production and distribution as well as the potential for transnational solidarity (both inter-union and with other social movements such as consumer groups). Two major types of commodity

chains can be identified, based on where in the chain the most powerful lead-firms are placed. In *producer-driven* commodity chains in industries such as automobiles, computers and electrical machinery (e.g. companies such as GM or Toyota) it is the TNC, which controls the production process and organises the incorporation of various production steps into the overall process. In *buyer-driven* commodity chains such as garments, footwear, house wares, big retail companies such as Wal-Mart or Nike, without participating in the production process itself, co-ordinate and often create GCCs and distribution systems (Gereffi, 1994; Gereffi *et al.*, 2005). These GCCs make it more difficult for trade unions to organise the workforce. It is one thing to organise transnational production workers within one company, it is even more difficult to organise solidarity along a GCC characterised by a multitude of employers. There has however so far been little explicit discussion on the character of labour relations, labour provisioning or trade union strategies that for instance could be linked to the different nodes in the value or commodity chain, or to different forms of chain governance. Some of the cases in this book, for example the Jaqalanka garment factory case (Chapter 7), illustrate well how labour and social movement collaboration along a GCC can significantly improve the strength of labour. What is clear is yet again that the traditional national level organisation of labour movements and a predominant focus on negotiating with governments and national business associations is not suited for responding to these new circumstances.

This reorganisation of the production process as part of globalisation has led to an increasing casualisation and informalisation of the economy, in which permanent, full-time employment contracts have to a large extent become a feature of the past. This is especially the case in developing countries, which had never been in a position to establish a large industrial sector with permanent and secure employment (Bieler *et al.*, 2008c: 266). Nevertheless, informalisation more and more also affects developed countries in the North, where employers are on the offensive and demand a flexibilisation of the labour market with the argument that this would be necessary in order to retain competitiveness.¹ Unsurprisingly, 'the increasing informalization of work creates a threat to basic living standards and the dignity of hundreds of millions of workers and their families' (Bieler *et al.*, 2008c: 267). Traditionally, trade unions were strongest in industrial sectors with large companies. Many workers in one and the same location were easier to organise. The rising service sector industry in combination with the informalisation of the labour market has made the organisation of workers increasingly difficult for trade unions. A decline in membership is the general picture. Additionally, there is the danger of a potential conflict between unionised workers in relatively stable employment conditions on the one hand, and non-organised workers in the periphery of the labour market or unemployed. The former could be tempted to pursue protectionist measures against the latter. Hence, trade unions may become the representatives of a labour aristocracy, which occupies privileged jobs in smaller and smaller parts of the economy (Pillay, 2008). This would leave them in a position of being unable to defend the interests of the working class as a whole or general society more widely.

Moreover, the transnationalisation of finance and the related emergence of a global financial market has implied that the owners of companies with the decisive decision-making powers are increasingly distanced from the concrete production process. Companies are more and more owned by big international capital investors, including pension funds representing postponed wage incomes of workers, who are not involved in the direct running of companies on a day-to-day basis. In transnational production structures, a production site in one country may have to follow instructions by the headquarters of the company in another country. As a result, even if trade unions have the right to negotiate with management of companies in one country, if this management is only the receiver of orders from higher up, local and national trade unions can have little impact on the economic decisions that determine conditions at their workplace (Lindberg, 2008: 28). The increasingly dominant role of big financial institutions further indicates the general increase in structure power for capital at the expense of labour and trade unions, which continue to be predominantly organised at the national level.

Globalisation has not only led to an intensification of exploitation at the work place. Exploitation has also increasingly been extended into the sphere of social reproduction. This includes financial cut-backs, the introduction of competition principles as well as outright privatisation of traditional public sectors such as education, health services, etc. It also implies an intensified exploitation of the environment as, for example, the deforestation of tropical rain forests shows. Resistance to globalisation, therefore, also includes resistance against these forms of exploitation by progressive environmental and social movements as well as reactionary, nationalistic groups (van der Pijl, 1998: 46–48). This understanding is based on a deeper historical materialist ontology including the spheres of production and social reproduction. The latter consists of three main components: (1) 'biological reproduction of the species [. . .]; (2) the reproduction of the labour force, which involves not only subsistence but also education and training; [and] (3) the reproduction of provisioning and caring needs' (Bakker and Gills, 2003: 32). Increased commercialisation and commodification in the sphere of social reproduction is part of the quest for capital accumulation. The potential cooperation between trade unions, as representatives of various working class fractions, and social movements, organising those progressive forces which resist neo-liberal restructuring of the sphere of social reproduction, can therefore be understood, in one of its aspects, as class struggle.

Importantly, it was only trade unions in the industrialised countries, which had secured strong influence on decision-making in Keynesian welfare states during the first 30 years of the post-war period. Developing countries had never been incorporated in such class compromises and, hence, the impact of globalisation is also played out differently in their countries. Here, the structural adjustment programmes of the International Monetary Fund (IMF) and the World Bank, driven by the neo-liberal Washington consensus, have been crucial in that they forced developing countries to open themselves up to imports and FDI and, thereby, undermined the development potential of these states (Saad-Filho, 2005). The global free trade agenda driven by the WTO since the mid-1990s, including the

Trade-Related Aspects of Intellectual Property Rights (TRIPS) accord and the negotiations for a General Agreement on Trade in Services (GATS) has further undermined national development potential in that it makes it more difficult and expensive for developing countries to get hold of latest technology for their own development and tries to open up not only manufacturing but also services for foreign TNCs (Mortensen, 2006: 175). The current Doha negotiations round of the WTO further pushes developing countries to dismantle tariff barriers for their infant industries and, against the deadlock within these negotiations, the USA and the European Union (EU) pursue unilateral routes with the same purpose of opening up developing countries. An analysis of the consequences of trade liberalisation in Africa and Latin America during the 1980s and 1990s reveals large-scale job losses, increasing unemployment and declining wages in both continents (War on Want, 2009: 5–13). Unsurprisingly, in contrast to trade unions in the North, who regularly support the free trade agenda, trade unions in developing countries being in a different location in the global economy as a result of uneven development (see below) fiercely oppose it in order to secure the state's developmental potential.

Before turning to the responses by labour let us underline two important modifications to this picture of transnationalisation, informalisation and the threat of a race-to-the-bottom. First, the pressures executed by the new global economic structures are mediated through varying national structures. These different national and regional contexts strongly influence governance structures and legal as well as political possibilities for action. We have in our previous volume analysed the effects of globalisation and the responses of labour seen from ten different national contexts, six of them from the global South. So, national context and national level power struggles are still important. Second, the new trends are not always negative from the perspective of workers. They also open up new possibilities for improvements in living standards and working conditions and new avenues for transnational solidarity, improving the power resources of the less privileged groups in society. In the reminder of this chapter, we first look at the possible strategies of trade unions and social movements in response to the challenges of globalisation, before analysing the wider structural conditions of the capitalist mode of accumulation, within which these strategies are played out.

Possible responses by trade unions and social movements

The aim of this book is to contribute to a discussion of how workers of the world can meet these challenges. Current analysis of globalisation tends to outline consequences for workers and unions rather than seeing them as actors, able to influence structures and power relations. Nevertheless, as Taylor (2008b) makes clear, restructuring processes are always the result of struggles between employers and workers in concrete companies and industrial sectors. Labour is, therefore, always also an active agent in these struggles over the future shape of the capitalist economy. And there are also weapons and tools in the hands of workers. Beverly Silver (2003: 13–16) notes a range of potential forces in the hands of labour: (1) A worker's marketplace bargaining power is determined by his/her position on the

labour market. If there is a scarcity of carpenters or doctors then this group has good marketplace bargaining power. Wide-spread unemployment, on the other hand, weakens the position of workers. (2) Workplace bargaining power stems from the position of a worker in the production process. Workers with key positions in a tight line of production or a chain of transport or distribution have strong workplace-based power. And (3) association power is achieved by workers uniting in organisations such as unions or political parties.

It is obvious that the challenges outlined above will make necessary new or renewed union structures where workers can act together across national borders. By focusing in this volume not on general overviews but on cases of transnational solidarity efforts from different branches and different parts of the world we can illustrate the diversity of challenges and the necessary variation of responses. We will see cases from manufacturing, where production units like auto factories are played off against each other, but also cases from private services, including construction and transport, where workers are affected in ways which differ from manufacturing. We will see how Silver's three potential forces in the hands of labour have different leverage in these different cases. And we will analyse cases from the field of services for social reproduction, where mutual self-interest and a joint ideological basis can pave the way for new types of collaboration between unions and other social movements.

Class is however only one of several interacting oppressive structures of our societies. It also makes much sense to analyse the international division of work in general from a gender perspective. Estimates indicate that women and girls carry out two thirds of world labour and receive less than one tenth of the income generated (Mohanty, 2003). Women own one hundredth of world property. Women form the majority of the world's poor and its immigrants. When analysing the prevailing world order one cannot but be struck by the existence of a power structure which seems to place women inevitably at the lower scales of working life, hardest hit by globalisation. Several of the chapters of this book (see Chapter 7 and Chapter 8) illustrate this double subordination of women workers and how their fights are not only class struggles but also struggles against a patriarchal power structure.

Several of our cases in this book concern not only labour unions but also other social movements. Social movements are an umbrella concept for a whole range of very different organisations and groups. Some are organised around human rights, women's issues or the rights of indigenous groups, while others are engaged in wild-life protection or climate change and others still try to stop privatisation of public goods, like the Norwegian campaign for the preservation of the welfare state (Chapter 12) and the Colombian fight against the privatisation of water and energy distribution (Chapter 11). Still other 'new' social movements are actually union-like, mutual-interest-based organisations of informal sector workers. Importantly, some social movements have a broad membership base among under-privileged groups of society, while others are more top-down structured non-governmental organizations (NGOs), depending on finance from the centres of capitalism. The challenge for social movements here is whether they are able to look beyond a particular issue and conceptualise their struggle against, for example, cut backs

in the health services as a struggle against wider neo-liberal developments. As Bieler indicates in Chapter 13, green NGOs in their support for a revision of the draft Public Procurement Directives in the EU almost exclusively concentrated on specific green criteria without considering their struggle as a part of a struggle against wider neo-liberal restructuring. A compartmentalised position of this type is unlikely to lead to a more general challenge of existing structures.

Seen from the other side, trade unions too have to open up to other social movements. They often regard the latter as potential competitors in international organisations and a threat to their special status, be it within the EU multi-sector social dialogue with European employers, be it in relation to their privileged role within the International Labour Organization (ILO) (Standing, 2008: 373). Trade unions often argue that social movements lack a representative democratic structure and, hence, internal accountability. It would not be clear whom they actually represent and for how many people they speak (Bieler and Morton, 2004: 314–16). Unless trade unions overcome their hesitation to open up themselves to social movements, effective cooperation between trade unions and social movements is unlikely. Considering, however, that social movements are often more suited to organise workers in the informal sector, this cooperation is absolutely necessary in the struggle against neo-liberal globalisation. It requires that trade unions take into account problems and solutions, which go beyond the workplace. If a trade union is willing, for example, to support the right to access to clean water for everybody, they become attractive cooperation partners for social movements, working in this area (Bieler *et al.*, 2008c: 283–84). Alliances with progressive civil society organisations equally represent association power.

It can be argued that the extension of neo-liberal restructuring into the sphere of social reproduction has created the objective conditions for cooperation between trade unions and social movements, as it implies similar and related pressures at the workplace and within civil society. Nevertheless, there is no guarantee that cooperation will automatically follow. Equally, while transnational production structures provide strong incentives for trade unions to cooperate across borders, it is not certain that this will actually happen. Importantly, it has to be kept in mind that solidarity between trade unions in different sectors and different parts of the world, just as solidarity between unions and social movements, is not automatic, nor static. As Mohanty (2003: 7) points out, ‘solidarity is always an achievement, the result of active struggle to construct the universal on the basis of particulars/differences. It is the praxis-oriented, active political struggle embodied in this notion of solidarity that is important’. Identification with others, as a basis for a solidaristic relationship with others, can be both broadened and deepened through intensified human contacts. Mutual self-interest can in times of global threats, like nuclear devastation and climate change, be broadened outside the original more restricted group of ‘we’. What then is the opposite of solidarity? The roots of the concept can, at least in the Western world, be linked back to a Christian and a Socialist tradition. It can be seen as opposed to a hierarchical or conservative social and moral order, in which small privileged groups may well show a solidarity of the (privileged) group but where solidarity-based movements among the

non-privileged is condemned as threats to social order. The concept of solidarity, as a basis for social order, can also be seen as opposed to a laissez-faire-liberal or neo-liberal ideology where all kinds of interest-based collective action – like protectionism, cartels, guilds, etc. – are seen as detrimental to the economy and the common good. Liberal or neo-classical market ideology combines that with a defence for egoism, saying that actors pursuing their own self-interest through the invisible hand create an optimal market economy. Thus, from very different starting-points both these traditions tend to take a critical position in relation to the movement which more than any other has lifted up the concept of ‘solidarity’ as its core value, the trade union movement.

It needs to be remembered that possible strategies of transnational solidarity take place within the wider structural conditions of the capitalist social relations of production. Agents can choose amongst several available strategies, but not in the context of their choosing. Structures enable some agents and prevent others, they facilitate certain strategies and hinder others (Bieler and Morton, 2001). The next section will, therefore, briefly look at the underlying dynamics of capitalist expansion in order to understand better the structural background of resistance to neo-liberal globalisation.

The dynamics of capitalism: uneven and combined development

Capitalism is based on the private ownership of the means of production and wage labour. Thus, those who do not own the means of production are ‘free’ to sell their labour power on the market. The capitalist mode of production is characterised by its inner logic towards intensified accumulation of more and more profits. Increases in productivity and the role of technology in achieving this play a crucial role in this dynamic. As David Harvey notes:

competition impels capitalism towards perpetual revolutions in the productive forces by whatever means of whatever sort. Capitalists compete with each other in the realm of exchange. Each has the possibility to alter his own production process so that it becomes more efficient than the social average. This is a source of relative surplus value to them. Once the competitors have caught up, the original innovators have every incentive to leap ahead once more in order to sustain the relative surplus value they were previously capturing.

(Harvey, 2006: 120)

The inner logic of capitalism in this relentless search for higher rates of profits, however, also implies that there is an inner tendency towards crisis, the second core dynamic of capitalist accumulation. While it is logical for the individual capitalist to replace workers through the introduction of new machinery in order to increase labour productivity and thus profits, capitalist competition implies that other capitalists have to follow this tendency. If, however, all capitalists replace labour with new machinery and produce more and more goods at cheaper prices, then there are fewer and fewer people left, who can actually afford to buy these

products. This results in a so-called crisis of overproduction and a declining rate of profits. Hence, what is a logic strategy for individual capitalists to increase profits, is catastrophic for the overall capitalist system, if all capitalists pursue this strategy in the search of competitiveness. 'Individual capitalists, in short, necessarily act in such a way as to de-stabilize capitalism' (Harvey, 2006: 188).

In times of crisis, capital has several possible options. As Marx and Engels wrote in 1848, 'how does the bourgeoisie surmount these crises? On the one hand through the enforced destruction of a mass of productive forces; on the other through the capture of new markets and a more thoroughgoing exploitation of old ones' (Marx and Engels, 1848/1998: 18). First, devaluation in the form of the partial destruction of production capacities will bring development back down to a level from where it can start afresh. This devaluation can take different forms. 'Capital held in money form can be devalued by inflation; labour power can be devalued through unemployment and falling real wages to the labourer; commodities held in finished or partially finished form may have to be sold off at a loss; the value embodied in fixed capital may be lost as it lies idle' (Harvey, 2006: 196). Second, capital can intensify the exploitation of the existing workforce (Mandel, 1975b: 25). Measures here include longer working days without additional pay, lower wages and cut-backs in labour related costs, etc. Third, capital attempts to secure new markets and locations for cheaper production costs abroad in competition with other capitalists. In other words, the reach of capitalism is extended in the search for new areas of profit-making. Robinson makes here the useful distinction between extensive expansion, i.e. the geographical expansion of capitalism in that it incorporates new parts of the world, and intensive expansion, in which 'human activities that previously were outside the logic of capitalist production are brought into this logic' (Robinson, 2004: 6). The latter refers to the extension of exploitation into the sphere of social reproduction and the commodification of areas such as health services and education, mentioned above. This again highlights the close connection between exploitative processes at the work place and within the sphere of social reproduction, which, as argued above, provides the objective basis for cooperation between trade unions and social movements.

It is, however, this geographical dynamic of extensive expansion, which has led to the spread of capitalist social relations of production across the whole world. Hence, there is a general expansive outward dynamic of capitalism.

Both in each individual country and internationally, capital presses outwards from the centre – in other words, its historic birthplace – towards the periphery. It constantly tries to extend itself to new domains, to convert new sectors of simple reproduction of commodities into spheres of capitalist production of commodities, and to replace sectors which have hitherto only produced use values by the production of commodities.

(Mandel, 1975a: 47)

The geographic outward expansion of capitalism takes, however, inevitably place within dynamics of uneven and combined development. As Silver outlines,

capitalists in crisis of declining profits have four potential strategies at their disposal: (1) a spatial fix, transferring production to other parts of the world with lower labour costs and less organised working classes; (2) a technological fix, lowering production costs through the innovation of the production process with the help of new technology partly replacing labour; and (3) a product fix, shifting investment from declining industrial sectors to new industrial sectors. Finally, and very similar to the product fix, capital engages in (4) a financial fix, in which financial instruments become the focus of intensified investment and points of accumulation in their own right (Silver, 2003: 132–33). In response to the worldwide economic recession of the 1970s, capital responded by drawing on all four strategies. First, in a financial fix more and more financial market instruments were developed as accumulation points in their own right and finance capital became delinked from industrial capital, preparing to a large extent the ground for the current global financial market crisis. Second, there was a product fix with increasing activities being concentrated in the services sector as the new growth point. Third, there was a spatial fix with the labour intensive parts of production being shifted towards developing countries. This was combined with a technological shift in developed countries through an increasing introduction of new technologies in the workplace. In other words, while labour intensive production was shifted abroad, new technology with related higher rates of labour productivity was introduced in industrialised countries. Silver talks about a bifurcation as a result of this combined technological and spatial fix:

on the one hand, new innovations in organisation and technology . . . provide the basis for more consensual labour-capital-state social contracts, allowing legitimacy to be combined with profitability, albeit for a shrinking labour force. On the other hand, in poorer countries, where competitive advantage is based on a continuous drive to lower costs, profitability requirements lead to continuous crises of legitimacy.

(Silver, 2003: 81)

Hence, while developing countries benefited from this development in the form of some kind of industrialisation, this took mainly place on the basis of outdated machinery and ultimately at the global level the developmental gap between developed countries and developing countries widened. In short, development was uneven and combined. ‘Capitalist expansion is a dynamic but also an uneven process, and in contrast to the neo-liberal (and pro-globalization) positions, this unevenness is not seen as a result of market imperfections, but is in fact a product of the way competitive markets work in the real world’ (Kiely, 2007: 18).

As Samir Amin argues, in the developed centres the Fordist pattern of production had for a large part of the twentieth century created conditions for negotiations for collective agreements as the base of the welfare state, while ‘in the peripheries of the global system, this same model could at best be implemented only partially in the “modernized-industrialized” niches immersed in an ocean lightly and especially inadequately integrated into the national set’ (Amin, 2008: XIV). The situation

of uneven and combined development underlies the ever expanding capitalist accumulation processes and provides the wider structural terrain for attempts at establishing transnational solidarity. When capitalism expands spatially, this does not imply that immediately all social relations in another country are subsumed under capitalism. Elements of old social formations continue to co-exist with capitalist social relations. 'Therefore a "peculiar mixture of backward elements with the most modern factors" arises within a social formation confronted with insertion into, and catch-up with, the expanding system of capitalism' (Morton, 2010: 10). In other words, uneven and combined development implies a great level of diversity within the capitalist world system. 'The history of this mode of production becomes the history of the developing antagonism between capital and pre-capitalist and semi-capitalist economic relations, which the capitalist world market perpetually incorporates into itself' (Mandel, 1975a: 43).

As a result, workers across the globe are certainly not in the same economic position. Workers in advanced industrial countries have to some extent benefited from the privileged position of their country in the global economy. As Mandel already wrote in 1970, 'it is hard to deny that American workers participated to a certain degree in the benefits of US imperialism's monopoly of advanced industrial productivity (technology)' (Mandel, 1970: 25). It implies that the economic interests of workers in different countries are likely to vary. The EU's Global Europe strategy provides a good example. While European manufacturing trade unions strongly support the intensification of free trade, as they regard it as guaranteeing their jobs through an increase in exports, trade unions in the Global South are opposed, as it threatens to destroy the fledgling industries and the related jobs in their countries (Bieler, 2009b). In short, global capitalism does not imply a homogenous global working class with the same interests. This does not exclude the possibility of transnational solidarity emerging through processes of concrete class struggle. Nevertheless, these structural difficulties need to be kept in mind when deciding on which strategies are most suitable for overcoming obstacles to solidarity.

If different segments of a global working class shall be able to gradually build transnational solidarity, workers in the centres and the peripheries of capitalism must be able to develop some kind of common understanding of their positions in the present world system. Capitalism has developed the productive forces at a pace and scale unparalleled in human history. At the same time it has made wider than ever before the gap between the potential of development and its actual use. The present level of scientific and technological knowledge could offer a solution to all the material problems of mankind, which is the common task of workers all over the world. However, income and wealth distribution reflects power relations both nationally and in the global system. The contrast between centres and peripheries of the present world system are no longer synonymous with the distinction between industrialised and non-industrialised countries. A country's position in the global pyramid is defined by the competitiveness of its products on the world market. But this does not mean that this market is governed by the simple 'market laws' of neo-classical textbooks but by the social relations of production and the resulting power structure. Today, as Samir Amin argues, the global law of value

produces polarisation in new forms, based on five monopolies of the centre of capitalism: monopolies of technology, control of financial markets, monopolistic access to the world's natural resources, media and communications monopolies and monopolies of weapons of mass destruction (Amin, 2003: 61–65). Workers in the centres of capitalism in particular need to observe critically their own position in the global hierarchies and avoid simplistic assumptions about workers in the peripheries following in their footsteps, a problem that is well illustrated in Jonas Sjölander's Ericsson case study (Chapter 4).

The book will be structured in six parts. Part I will introduce the main focus of the volume and provide the relevant conceptual background to the individual contributions. Part II will provide a specific focus on inter trade union cooperation across borders, while Part III will analyse the dynamics of cooperation between trade unions and social movements across borders. This includes a specific focus on transnational struggles in developing countries including Mozambique and Sri Lanka as well as countries in the semi-periphery such as East Asia and Turkey. Part IV will continue this theme, but here with a specific emphasis on struggles to defend the public sector against private service providers. Part V will provide further analyses of trade union – social movement cooperation, this time however in relation to struggles in developed countries. Part VI will conclude with an overall assessment of possible ways forward towards transnational solidarity of formal and informal labour in the global economy.

Overall, the book will provide a whole range of concrete case studies of successful and failed transnational solidarity covering inter-trade union cooperation as well as cooperation between trade unions and other social movements within both the formal and the informal economy, the public and private sector. This will help us to understand better the dynamics behind the possibilities but also problems of trade union and social movement cooperation across borders.

Note

- 1 For data on the level of informalisation in developing and developed countries, see Bieler *et al.* (2008b: 9–10).

2 Trade unions, global competition and options for solidarity

Richard Hyman

Introduction

Almost universally, trade unions in Europe (and globally) are on the defensive, having suffered a decline in membership, in public status and in effectiveness in achieving their core objectives. There has been widespread discussion of the need for modernisation, revitalisation and renewal (Hälker and Vellay 2006). With their involvements in both formal organisational links and informal networking at European level, union policy-makers have paid increasing attention to experience in other countries.

Trade unions developed in the twentieth century as national actors. As collective bargainers, in most countries their primary role was at national (sectoral or cross-sectoral) level. As 'social partners', their key concern was to influence the macroeconomic and social policies of national governments. The precondition of effectiveness in both cases was that their counterparts – employers collectively, and the state – enjoyed relative autonomy in shaping the wage relation. The increasing integration of the global economy, and more specifically the European economy, puts this autonomy in question. As the editors note in their Introduction, many analysts have seen 'globalisation' (or, more narrowly, 'Europeanisation') as a challenge from above which narrowly constrains the scope for employment regulation at national level, and hence undermines the regulatory capacity of trade unions themselves. Inability to achieve the improvements in real wages and social benefits which had become part of workers' normal expectation is in turn seen as a reason for loss of membership and status.

Others have contested this analysis. Globalisation is a notion, which is typically 'left vague and undefined, better to conjure up the large panoply of forces that have seemingly imposed similar imperatives across advanced industrialized countries' (Schmidt 2002: 13). Yet some of the most successful (by conventional criteria) trade union movements have been located in relatively small, open economies. There is a substantial literature which insists that 'globalisation' is as much a political as an economic phenomenon and that the notion of the eclipse of the nation-state is a myth (Weiss 1998). From this perspective, a reversal of the gains achieved by trade unions in previous decades is not inevitable. This is certainly part of the thesis developed in Western's important study (1998): unions thrive where they are 'institutionally isolated' from market forces (by government policies of

demand management, institutional supports for collective bargaining coverage, and/or a formal role in welfare administration). Where unions are already relatively strong, they are best able to maintain an influence on public policies in order to limit the damaging effects of 'globalisation'. The logic of this interpretation is that the gap between 'strong' and 'weak' union movements is likely to widen, spelling growing diversity rather than convergence. As a corollary, the severity of external challenges to trade unions, precisely because these are mediated by political decisions, will be cross-nationally variable.

Certainly the reality behind the discourse of globalisation is that 'competitive-ness' has become a key priority for trade unionists. *Standortsicherung* has become an overriding principle, as localised workers are increasingly compelled to compete with those in other localities (and countries) – a process deliberately fostered by transnational companies. Trade unions in most countries achieved their peak of membership and hence representativeness with the expansion of large 'Fordist' manufacturing firms and of centralised public services. In the former case, sectoral collective agreements took wages out of competition and provided employers with (at least partial) guarantees of labour peace; in the latter, public authorities often had a political rationale for encouraging collective representation. Typically also, union strength was based among male manual workers in full-time employment and with more or less permanent contracts. Often, trade unions mirrored the centralised, bureaucratic character of their members' employers; while the construction of solidarity among a workforce with limited opportunity for individual career advancement encouraged the pursuit of a standardised 'common rule' in employment.

Changes in the demography of both employers and employees have challenged established regulatory processes from below. Curbs on public expenditure, and in some countries an extensive process of privatisation, have diminished the size of former public sector strongholds. The average size of private firms has shrunk (in part because of the fashion for contracting out activities which were formerly undertaken in-house), and small firms tend to be less unionised and less willing to affiliate to employers' associations or observe collectively agreed conditions; while increasingly, even large private employers seek to develop company-specific regimes of production organisation and conditions of employment, either abandoning their associations or insisting on a shift to a two-tier bargaining system in which decentralised negotiations assume predominance. In some respects linked to these trends, there has been everywhere a relative decline in the manufacturing sector and a growth in private services, which in most countries have in the past been weakly unionised. In all these respects, the structure of employers which supported a nationally standardised system of industrial relations has given place to a 'post-Fordist' pattern which, it is often argued, presupposes a more diversified and fragmented system, often without any form of collective bargaining.

The parallel changes in the labour force are in part a consequence, in part a reflection of separate dynamics. Universally, white-collar employees today outnumber manual workers. In almost all countries, the former were traditionally far less well unionised than the latter, to some extent because the scope for individual

career progression inhibited collective consciousness but also because many trade unions had reservations about recruiting occupational groups, which were seen as close to the employer. Among manual workers, occupational differentiation has increased, and indeed the boundary between manual and white-collar (always conventional as much as real) has become blurred. The growth in non-manual occupations is linked to a feminisation of the workforce; and many union movements in the past failed, or often made no serious effort, to recruit and represent women. To some extent a connected process, there has been a growth in part-time employment. Other increasingly prevalent forms of 'atypical' work include fixed-term contracts, agency work and dependent self-employment: again, categories not traditionally unionised in most countries. In many cases the labour force has also become far more ethnically diverse, and minority groups have often been neglected by trade unions.

To some extent related to these workforce trends, it is often argued that employees have become more individualist in orientation; or, put rather differently, that work itself has a diminishing importance in defining personal identity. To the extent that disparate personal life-worlds shape employees' expectations and aspirations from work, the possibility that a standardised common rule can satisfy is diminished. As Björkman puts it (2006: 330), 'there are no average members' any longer. For many analysts, the consequence is that solidarity is no longer possible, or at least cannot be sustained as traditionally defined by most trade unions.

Though the above trends are common across countries, the extent to which economic and occupational structure has been transformed varies cross-nationally. But in addition, how trade unions experience and evaluate such trends varies substantially. Locke and Thelen (1995) have suggested that ostensibly similar issues vary markedly in significance according to national circumstances and traditions; while apparently dissimilar issues may have the same implications. More specifically, the historical formation of distinctive national union identities shapes those issues which are likely to provoke major conflict and those which are not. Hence in the USA, the struggles of the 1930s and 1940s established a system involving rigid job definitions and a prescribed seniority-based hierarchy of promotion opportunities and job security; in consequence, employer demands for more flexible forms of work organisation challenge principles of union action in ways which do not arise in most European countries. By contrast, in Germany the pressures for more flexible organisation of working time and for greater company-level discretion in wage determination clash with the institutional/ideational significance of the *Flächentarifvertrag*. Conversely, in both Sweden and Italy (though in very different ways) egalitarianism has been a vital component of trade union identities, and pressures for increased pay differentials between and within sectors in the one case, the abolition of the *scala mobile* in the other, had disruptive effects which would not have occurred in different national contexts.

This argument has parallels with my own discussion (Hyman 2001) of trade union identities and ideologies as involving a triangulation between market, class and society. Unions whose *raison d'être* rests primarily on control of the labour market through pay bargaining with employers (as in the UK) will be more

sensitive to an erosion of economic bargaining power than those (as in France) oriented more centrally to mobilising workers, whether or not union members, to press government for improvements in minimum wages and social benefits. Inherited identities also shape the likely trajectory of union renewal: trade unions rarely overturn all their past definitions of character and purpose; rather, they adapt selectively, and seek to persuade members and activists that any changes remain consistent with the fundamental values and objectives of previous generations. For this reason, the course of 'modernisation' is likely to be path-dependent.

As the editors stress, capitalism is constantly restructuring and transforming: as Marx put it, capitalist survival requires 'constant revolutionising of production, uninterrupted disturbance of all social conditions, everlasting uncertainty and agitation . . . All that is solid melts into air'. Yet historically we can speak of periods of relative stability and others of radical restructuring. The present moment is clearly one of systemic transformation; and at such times, trade unions are typically fire-fighters, reacting desperately to challenges to the established 'industrial legality' (as Gramsci put it). Typically also, they do so in a strategic vacuum.

Is there an alternative? My argument is that trade unions need to redefine, indeed re-invent, their understandings of solidarity; and to do so they need to rediscover how to behave proactively and strategically. Both solidarity and strategy are words much used and abused, but their meanings are complex and elusive. Below I offer some reflections on both.

How can trade unions act strategically?

The notion of strategy is often used loosely. Etymologically, it is a military metaphor, deriving from the Greek for a general: strategy denotes the planning of a whole campaign or war, in contrast to the tactics deployed in a single battle. This clearly requires a long-term perspective (though there will surely be disagreements on the nature and duration of the campaigns in which unions are engaged, and indeed whether to regard industrial relations as analogous to war), and also effective overall coordination.

The literal origins of the term also suggest that strategy is closely related to leadership. This is a concept which often causes unease to those committed to union democracy. 'Who says organisation, says oligarchy', Michels famously concluded. Union democracy clearly requires adequate scope for all categories of members to shape the priorities and programmes of their organisations. It also requires appropriate *structures* for participation, involvement and self-activity at rank-and-file level. Yet grassroots self-determination alone, as Streeck (1988: 312) has argued, seems a recipe for 'a "pluralist" multitude of small, narrowly based collective action units competing with each other for organizational resources and political influence' and lacking 'a capacity to deliberate and control the macro-level outcomes of their actions'.

The self-negating consequences of purely decentralised democracy can be transcended only when articulated – a point developed further below – by coordination from above. Union effectiveness requires 'the capacity to interpret, decipher,

sustain, and redefine the demands of the represented, so as to evoke the broadest possible consensus and approval' (Regalia 1988: 351). This is one of the functions of leadership, which is therefore a prerequisite for participative democracy to deliver beneficial results. As Barker *et al.* insist (2001: 15–17), it is crucial to differentiate between *authoritarian* and *authoritative* leadership, and between leadership as *hierarchy* and as *process* or *function*: 'leadership is exercised at all manner of levels and locations . . . and not only by those obviously designated as "leaders"'. Gramsci's notion of the 'organic intellectual' is relevant here: grass-roots activists may develop a breadth of information and analytical capacity which distinguish without distancing them from their colleagues. Hence there can, and must, be a complex dialectic between leadership and democracy.

One of the most substantial attempts to explore trade union strategic capacity in terms of such a dialectic is the study by Ganz (2000) of the unionisation of California farm workers in the 1960s. The United Farm Workers (UFW) possessed only limited resources, but compensated for this through what Ganz terms 'resourcefulness'. This derived from the interaction between the personal qualities of the UFW leadership team and the union's internal organisational structures (factors which, one might add, are often causally interconnected). 'Strategic thinking is reflexive and imaginative, based on how leaders have learned to reflect on the past, pay attention to the present, and anticipate the future' (2000: 1009). Such creative thinking is essentially collective; it is most likely when there is a leadership team from diverse backgrounds and with a range of organisational experiences, and is least likely when there is a homogeneous leadership group deeply embedded in bureaucratic routines. The organisational characteristics which Ganz identifies are 'deliberative arrangements, resource flows, and accountability structures' (2000: 1007). Where there are effective channels of both horizontal and vertical dialogue over aims and methods, with democratic involvement of activists and the general membership, and a recognition that union effectiveness depends ultimately on the members' willingness both to pay and to act (Offe and Wiesensthal 1985), the scope for successful strategic initiative is enhanced. This point has been reiterated by Heery (2005) in Britain and Milkman in the USA (2006: 152–53): successful organising requires an interconnection between 'top-down' and 'bottom-up' approaches.

Trade unions are collective organisations, and insights from analysis of strategy within (typically capitalist) organisational settings are thus potentially at least of relevance to trade unions. The notion of organisational learning has received growing attention within the management literature over the past three decades. One may question some of the presuppositions underlying this concept: not only whether organisations are unitary actors (as discussed below), but also whether – or in what sense – organisations as such *act* at all. Action clearly occurs *within* organisations, and by individuals and groups *in the name of* organisations, typically deploying organisational *resources*; but these social and political processes are mystified by attributing the essentially human process of action (or, more specifically, of learning) to more abstract and impersonal entities. Be that as it may, organisations are clearly contexts within which learning can occur, and organisational effectiveness

may well depend on the capacity of those within them collectively to learn appropriate responses to new challenges – and, in the process, as emphasised below, often to *unlearn* responses which are no longer appropriate.

Huber (1991) provides a useful overview of recent managerial literature, identifying four dimensions of organisational learning. The first is the acquisition of new knowledge; the second, its dissemination and generalisation within an organisation: for ‘organizations often do not know what they know’ (1991: 100); if information and experience are fragmented among a diversity of individuals and groups, without overall coordination, their potential is radically diminished. Third is the interpretation of knowledge: making sense, inevitably selectively, of what increasingly involves information overload. Finally, organisational memory is essential if useful learning is not to be lost. All four dimensions have obvious relevance in the trade union context.

Also relevant are distinctions between different types or levels of learning. Bateson (2000: 167–69, 274) distinguishes between first-order ‘proto-learning’ and second-order ‘deutero-learning’. In the first, an individual solves problems by trial and error; with experience, the correct solution is applied without the need to experiment. In the second, the individual learns *how* to learn, and is able to devise solutions more rapidly to *new* problems. While Bateson founded his analysis on animal (and individual human) behaviour, a similar distinction was soon proposed by Argyris and Schön (1974) in the context of business organisations: that between single- and double-loop learning. The former involves learning to apply established procedures; the second, critically scrutinising these procedures. Organisational politics normally make the latter difficult, since it requires those at the sharp end of organisational practices to challenge the policies and procedures defended by those in more powerful positions; the prudent course is to keep quiet. Hence normal organisational processes encourage subordinates to suppress doubts and conceal information, reinforcing single-loop learning; double-loop learning tends to occur only in ‘extreme conditions’ of crisis (Argyris 1976: 373).

Much of the vast subsequent literature on organisational learning addresses how the obstacles to second-order learning may be overcome and positive incentives created. Nonaka (1994) points to two key questions: how the knowledge of individuals within an organisation can be generalised and socialised; second, an overlapping issue, how knowledge which is intuitive and not explicitly articulated can be made explicit. Part of his answer is that it is necessary to create ‘communities of interaction’ through which individuals share experience on a foundation of mutual trust, synthesising discrete understandings into a more coherent whole. How does this occur? One answer is that a crisis for the organisation can generate ‘creative chaos’ which in turn encourages social learning. Another is that individuals who possess surplus (‘redundant’) information may integrate this in innovative ways. A third is that those in intermediate positions in the organisation may facilitate both upwards and downwards communication. Finally he suggests, by analogy with computer software, that such processes are facilitated by the construction of a ‘hypertext’ structure which can ‘provide the organization with a strategic ability to acquire, create, exploit and accumulate new knowledge continuously and

repeatedly'. This requires non-hierarchical institutions to complement the more hierarchical arrangements which govern routine activities.

Can such analyses be applied to trade unions, and if so, how? Zoll (2003) has extended Bateson's core distinction to 'trade unions as learning organisations'. In responding reactively to specific challenges, they exhibit first-order learning. To the extent that they recognise that new challenges are the order of the day, and are able to develop internal structures and processes to facilitate reflection over new problems and collective discussion of appropriate responses, they advance to second-order learning. But Zoll goes on to suggest the need for third-order learning, involving the critical scrutiny and redefinition of unions' existing learning strategies and structures, and more fundamentally of their existing understanding of what it is to be a trade union. The challenge of attracting and representing a far more diversified employee constituency than existed even a few decades ago means that to survive and thrive, unions must reinvent themselves as organisations.

More recent literature on organisational learning has had little impact on trade union analysis, but its relevance is not hard to perceive. One of the few systematic applications of this literature in the trade union context is the study by Huzzard and Östergren (2002) of the Swedish private-sector white-collar union, SIF. They point out that theories of organisational learning have been developed within a unitarist, managerialist framework, tending to neglect internal diversity and conflict over organisational identity and purpose (Huzzard 2001). This is even more a problem in the context of trade unions, which – unlike business organisations – have an explicit democratic rationale, and in which competing ideological tendencies possess at least a degree of legitimacy. Huzzard and Östergren found a major disjuncture between the 'modernising' conceptions of the national SIF leadership – seeking to move towards a more individual-oriented service to workers and greater partnership with employers – and the continued commitment of most local leaders to the values of collectivism, solidarity and (if necessary) militancy. The authors interpret this ideological contrast as a 'barrier to organisational learning'. An alternative reading, however, is that local activists fully understood the problems which the national leaders identified and the alternative strategies they were proposing, but rejected the latter as deriving the *wrong* lessons from the former. This indeed is the message of their conclusion (2002: S58): trade unions 'have difficulties in developing shared meanings, visions, ideologies and identities,' but 'if learning is a *dialectical* process, then ideological differences may even promote reflection and learning rather than hinder them'.

Two final considerations on organisational learning are important. The first follows from Huber's argument that 'organizations often do not know what they know'. In an important sense, of course, organisations as such do not 'know'; knowledge is a human capacity, though the knowledge of many individuals is synthesised, disseminated and retained within organisations. However, experience acquired at specific levels or in particular locales within a union (or any other organisation) may not be generalised (and as Argyris and Schön suggest, there may even be structural disincentives to generalising valuable experience). To return to the analysis of Ganz, effective *intra*-union communication channels – what

Culpepper (2002), in a different context, calls 'dialogic capacity' – are thus of key importance; and, one may add to the extent that the most serious challenges today concern labour movements as a whole, effective *inter*-union (and indeed international) channels are essential.

The second point to emphasise is that before we can learn we may have to *unlearn* our established routines and conventional wisdom. Hall (1993: 279), in his analysis of 'social learning' at the level of the state, has argued that 'policy-makers customarily work within a framework of ideas and standards that specifies not only the goals of policy and the kind of instruments that can be used to attain them, but also the very nature of the problems they are meant to be addressing'. And it is certainly the case that trade union policy-makers 'tend to rely on familiar repertoires or behavioural scripts when faced with new conditions' for which old tactics may be inappropriate (Johnston 1994: 37). Milkman (2006) has shown how the organisational approaches which served effectively a few decades ago for American industrial unions in large-scale manufacturing industries were totally unsuited to the growing numbers of low-paid, insecure service employees often working for small subcontracting employers; locals without an industrial union background have been the most successful in organising such groups. In the management literature, the notion of 'competency traps' (Levitt and March 1988) is widely used: skill in applying methods which worked well in the past is an obstacle to innovation in changed circumstances. Within trade unions, particularly those long established, the widespread respect for precedent and protocol means that the traditions of all the dead generations frequently inhibit learning; as Ross and Martin comment (1999: 4), unions 'are "path dependent", constrained organizationally by their pasts. They tend to move in directions which will not threaten shared ideas, values, and habits and their organizational learning will be skewed towards what is already known'. To overcome such conservative bias, strategic innovation often requires a process of creative destruction.

The logic of the previous discussion is that strategic capacity in trade unions is a product of *both* leadership *and* internal democracy. In his classic comparative study, Kjellberg (1983) argued that the most effective union movements combined, in an articulated manner, strong central organisation (coordinated leadership) with vibrant local activity (high membership participation). This combination was one of the explanations of the exceptional unionisation in Sweden. A similar thesis has been developed more recently by Lévesque and Murray (2003), who explore the means of refashioning trade union power in the face of economic internationalisation. They propose a triangulation between three elements: the strategic capacity of workplace union organisation (its ability to develop a proactive agenda rather than simply reacting to management's initiatives); the internal democratic life of the union ('internal solidarity'), which enables members to identify with – or in the current jargon, to 'own' – the policies pursued on their behalf; and 'external solidarity', the degree to which broader national (and international) organisational resources and commonalities of interest shape local priorities and counteract the pressures towards competitive undercutting of standards. Their conclusion is the need to build a virtuous circle of proactive capacity, active democracy and higher-

level strategic support as the basis for an effective strategy for labour: 'it seems more and more obvious that these three levers of power are mutually reinforcing' (2003: 22).

In a subsequent study, Lévesque *et al.* (2005: 402) suggest that workers' identification with trade unionism has been undermined by a 'radicalization of difference. Divergent social identities challenge traditional notions of collectivity and lead to an erosion of the relevance of traditional frames of reference'. Their survey of union members in Québec found that those most likely to see trade unionism as relevant to their own circumstances felt that they were consulted over union policy and had an opportunity to shape its direction. 'Democracy is a building block in the construction of union identity' (2005: 409).

A theme of much of the preceding analysis has been, that, trade union strategic capacity can be, and needs to be, enhanced through internal dialogue, discussion and debate. Uniform policy cannot be mechanically imposed when the 'average' member no longer exists (if she/he ever did); increasingly, unions need to be 'discursive' or 'dialogical' organisations, allowing the explicit negotiation of increasingly overt internal differences. This prescription is not of course unproblematic: within any union, some individuals and groups are more motivated and/or able to voice their opinions and interests than others. Traditionally, the formal democracy of many unions has been a framework within which certain sections (male, full-time, native-born, relatively skilled) have dominated policy-making. Today, electronic communications permit a far broader participation in strategic dialogue, but as anyone involved in union message boards appreciates, the most active participants tend to be self-selected advocates of a distinctive agenda. How to achieve 'bottom-up' dialogue which is truly representative of the diversity of rank-and-file opinion is a major challenge.

One answer, which links back to Offe and Wiesensthal (1985), is that one of the leadership tasks in agenda-setting is to transform particularistic and competitive demands and aspirations into more encompassing policy goals by redefining the 'spontaneous' self-definitions of interest. And here, it is necessary to move beyond the *process* of discourse and dialogue to the *content*. Fragmentation of employee identities and self-definitions of interest is not a natural development, but rather the outcome of politically-driven efforts to erode national post-war industrial relations settlements and hence to weaken or remove workers' social protections and set them in competition and conflict one with another. What is at issue is a radical shift in the balance of forces between labour and capital. Dore (2003: 32), a writer not given to over-dramatisation or leftist rhetoric, has described the attack at national level on established employment protections as the outcome of 'not only flexibility/efficiency objectives but also the political objective of breaking the power of the trade unions and their ability to influence the electorate'. In his assessment, 'politicians who responded with the legislation demanded by the powerful managerial class, were not just concerned with creating the conditions for national competitiveness. They were also engaged in class struggle'. Class struggle is a good description for the Washington consensus, and it is equally fitting as a characterisation of its current enthusiasts in Brussels.

To defend employees at workplace level and no less within the national (and international) political economy requires a confrontation with the dominant policy logic of our age. This implies that unions must turn (or return) to a self-conception as organisations campaigning for rights and engaging in 'contentious politics' (Tarrow 1998). This involves an assertion of unions' identity as 'sword of justice' (Flanders 1970): contesting oppression, inequality and discrimination. In consequence, as the editors insist, it also implies cooperation, often uneasy, with other social movements which have never acquired the respectability gained by trade unions in most countries. Potentially it redefines unions as outsiders in a terrain where until recently the role of insiders was comforting and rewarding.

The key issues here involve ideas, language and mobilisation. The decline of union organisation is in part ideological in causation: European unions were able to thrive when the prevailing policy discourse made collective regulation, employment protection and state welfare provision the commonsense of the times. The ideological counter-revolution of the past three decades – which has indeed proceeded further and faster in some countries than in others – has placed trade unions very much on the defensive. They are often seen as representing a vested interest: those who are already relatively secure in the labour market, and have relatively good wages and working conditions; those who are in most cases winners or at least not major losers in the process of economic restructuring. But unions have to convince themselves and others that, they are the voice of the majority, that they represent the losers as well as the winners, and that they want to try to convert the losers *into* winners.

Tilly (2006) has made the point that socio-political movements draw on 'repertoires of contention': forms of action which have been developed in the past and provide 'scripts' for the future, but which nevertheless are subject to constant innovation. Such repertoires, he suggests (2006: 184–85), contain three key elements: 'identity', the assertion that those involved are a group with distinctive interests and the capacity to pursue these vigorously; 'standing', the insistence that these deserve to be taken as seriously as the claims and interests of other more powerful socio-economic groups; and 'programme', an integrated set of demands. All three in his view are mutually supporting. Indeed this is a useful prism through which to regard European trade unions: in their period of greatest strength they could credibly claim to represent a constituency with a strong collective identity, to possess the standing of a valued actor in societal policy-making, and to articulate a programme which reflected the general interest. In more recent times, in most countries, all three claims have been weakened, and this weakening has been mutually reinforcing. New vocabularies which give meaning to the identity, standing and programme of trade unionism are part of the key to union survival and renewal.

In conclusion: redefining and re-inventing solidarity

The principle of solidarity has a long history, and like most evaluatively charged concepts, its meanings have changed over time and its interpretations remain varied. For example, both socialists and catholics commonly appeal to the ideal of

solidarity, but what they understand by this is in many respects very different. It is not my intention here to explore the etymology and historical evolution of the concept, but it is important to highlight some of its contrasting implications.

One conception presupposes common *identity*, the possession of characteristics which mark individuals as members of a group – the nation, the tribe, the religious sect (or perhaps also devotion to a particular football club or pop group) – with a collective loyalty and a clear sense of difference from those outside its ranks. Sometimes the homogeneity of the group may be reinforced by rituals, uniforms, an arcane vocabulary. The common obligations deriving from uniformity constitute what Durkheim defined as ‘mechanical solidarity’: externally imposed commitments which allow no significant space for choice or reflection. In the past, perhaps, this model of solidarity represented a predominant part of the collectivism of labour movements.

A second type of solidarity, at times overlapping with the first, is based on awareness of common *interests* which are best pursued collectively. This is the classic rationale for trade unionism: workers as a whole are victims of oppression and exploitation, individually weak as employees, consumers or citizens; but unity is strength. The foundation of effective labour movements depended on what, elsewhere (Hyman 1999), I have described as ‘solidarity as a mobilising myth’. It was by emphasising the commonality of interests that union organisers sought to persuade workers that ‘an injury to one is an injury to all’. And because interests are shaped by subjective perception as well as objective situation, belief could create its own reality. ‘Solidarity forever’ became factual, to the extent that the heroic myths actually shaped workers’ understanding of their own circumstances.

A third meaning of solidarity, central to the thesis which I develop here, involves *mutuality despite difference*. This perception of mutuality may be based on a sentiment of interdependence, generating what might be called a second-order community of interest in sustaining a set of social relationships in which all are positively implicated. It was in this sense that Durkheim wrote that the elaborate division of labour within modern societies created the basis (or at least the potential) for an organic solidarity, more nuanced and more flexible than the rigid uniformity of earlier social structures. A different way of comprehending such mutuality is as an expression of the common fate of humanity. No man [or woman, we would add today] is an island, wrote John Donne. From this perspective, there is an obligation for the strong to support the weak – either on the pragmatic rationale that the roles might on some occasion be reversed, or through a more diffuse recognition of the human condition. In some variants, this third approach may turn solidarity into a synonym for charity, implying pitying support for passive victims. This is far removed from the socialist view of solidarity as active and reciprocal. Nevertheless, the idea of mutuality despite difference is in my view essential in order to inform and enrich the solidarity of labour movements in a world where many of the old reference points of identity and status have been eroded.

As Richards argues (2001: 35–36), ‘labour solidarity has always been a constructed and contingent phenomenon built on local foundations. It is now more so than ever in an era of generally decentralised industrial relations, increasingly

localised threats, fragmented work forces and growing corporate power'. Yet a fragmentation of solidarity, in a context where localised workers are increasingly compelled to compete with those in other localities, is no effective solidarity at all. This means, to return to my previous point, that local activism is necessary but not sufficient for effective union strategy. But how can fragmentation be overcome?

In the past, unions have often striven to overcome differentiation by imposing what Webb and Webb (1897) termed a 'common rule', or what I have described as 'mechanical solidarity', imposed from above (Hyman 2004). But the 'radicalisation of difference' means that diversity cannot be suppressed; it must be accepted, even welcomed. The issue is how actual and potential trade union members can be encouraged to perceive common interests despite difference, and to negotiate the tensions which often exist between their own multiple social identities in a way, which is compatible with collectivism. This is to raise difficult questions of human subjectivity and intersubjectivity. As Zoll (1991) has insisted, increased differentiation of circumstances and interests, and the growing uncertainty of social norms and values, make effective unity of action possible only if trade unions become 'discourse organisations'.

In many respects, the malaise afflicting labour movements in much of the world today stems from the exhaustion of their old model of collectivism. In its traditional form, 'solidarity' was a slogan which easily matched a conception of a working class, which was not recognised as differentiated by gender, skill, ethnicity or other significant characteristics. How do we understand the idea of solidarity if the old notion of an undifferentiated proletariat is abandoned? One answer is to attempt to impose the 'common rule' bureaucratically from above, to denounce as class enemies those who subversively attempt to define their own distinctive agenda. Another is to make solidarity a form of ritualised profession largely detached from day-to-day trade union practice. This is almost certainly the case with most expressions of trade union internationalism. Waterman (1998: 81) notes that over a century ago, Australian dock workers subscribed the equivalent of several days' pay to support their striking colleagues in London, who a year later responded with similarly impressive sums when the Australians were in dispute. Today, such solidarity is scarcely imaginable: internationalism is largely the preserve of the professional labour diplomat; one may doubt how many union members have even heard of the International Trade Union Confederation (ITUC), or indeed of the European Trade Union Confederation (ETUC), even though they are affiliated to both. This lack of articulation between bureaucratic, institutionalised solidarity and a collective sense of mutuality is one reason why bodies such as the ITUC and the ETUC pack so limited a punch.

Is there an alternative? It is possible to suggest an answer, both policy-oriented and organisational. The starting point must be that solidarity involves the perception of commonalities which extend, but do not abolish, consciousness of distinct and particularistic interests – the third meaning identified above. Workers' organisations themselves acquire cohesion and effectiveness by shaping the ways in which members and supporters identify their own circumstances and frame their own grievances and aspirations. This process can be double-edged. Most labour

movements in the nineteenth and twentieth century expressed as general interests of the working class what were often the specific interests of its strongest sections. To cling to former models of solidarity means increasingly to suppress the more differentiated concerns of women workers, members of minority ethnic groups, those with marginal occupational status, new entrants to an increasingly unfriendly labour market, and so on.

A solidarity which can appeal to those outside the traditional ranks of trade unionism must accommodate, indeed welcome diversity. Hence, it is more appropriate to speak of solidarities in the plural rather than in the singular. Solidarities must be multi-faceted, first because the labour market circumstances of different groups of workers are varied (and in some respects in competition); second because extra-work identities (which nevertheless affect how employees regard themselves as workers) are increasingly differentiated. In his thought-provoking book *Beyond Individualism*, Piore (1995) has suggested a new understanding of trade unions, first as 'communities of action' (organisations that provide a context for individual self-realisation), and second as 'borderland institutions' (which bridge the ideals and perspectives of distinct social or cultural groups). Both themes imply abandoning the principles of mechanical solidarity. In other words, regulation of employment must be flexible, not uniform; common action must be the outcome of debate and discussion, not hierarchically imposed; and the suppressed alternatives of traditional collective action must be rediscovered.

A concrete example will be helpful. For more than a decade, the world of work has been permeated by risk and insecurity. The demand by employers – and increasingly, governments – for 'flexibility' means reversing many of the gains won by labour movements over more than a century, which ensured that workers could not be treated simply as disposable commodities. There can be no doubt that, among workers, this is a source of disorientation and resentment (though the outcome can often be to find scapegoats among even more vulnerable sections of the community). Yet the discourse of flexibility also connects with the attractions of individual autonomy and choice. Can trade unions bridge the borderland between insecurity and autonomy?

This raises difficult issues. It is right to be suspicious of the idea of 'soft law' (or the more recent analogue, the 'open method of coordination'), notions which have become central to Eurospeak: the implication is a process of regulation which does not genuinely regulate. But consider some specific questions for contemporary trade unionism. For example, should overtime working be prohibited altogether; rewarded by extra payments; or compensated by time off at the individual's own discretion? Some recent agreements in Denmark seem to have confronted the fact that union members have differing preferences by offering a menu of options. Should part-time employment be resisted (until recently the reflex union response in most of Europe), or should there be scope for variable hours of work – if employees themselves can agree or refuse, and can obtain the same employment rights as full-time employees? If the 'normal' employment relationship of the twentieth century is increasingly eclipsed, and 'atypical' forms are increasingly typical, unions can either continue to fight battles which are probably already

lost, or can mobilise for effective, flexible regulation of the current employment jungle.

The challenge for trade unions today is thus to develop forms of regulation which define a solid framework within which workers can exercise genuine choice. This means determining which rules should be primary and universal, which are secondary and discretionary. It means redefining flexibility, resisting flexibility as precariousness and vulnerability but embracing flexibility as the right to choose within an overall framework of protection. This would be an expression of a genuinely organic solidarity: a combination of universal shelter and individual opportunity.

A more fundamental rationale for new conceptions of solidarity is that the terrain of collectivism has shifted: the old model may be unsustainable even in its own terms. While I do not necessarily endorse all his propositions, I tend to agree with Beck (2000: 163) that in the twenty-first century 'there is no "natural" community of neighbours, family or nation. There are only legends about their "naturalness" (which can, of course, be extremely effective)'. Beck's challenging hypothesis, drawing on his earlier analysis of 'risk society', is that 'the risk regime also involves a hidden community-building power': a common awareness of external threat 'can create active solidarity among strangers'.

The challenge is to reconceptualise solidarity in ways which encompass the local, the national, the European and the global. As Hoffmann has argued (2002: 143–44), 'Europeanisation and globalisation are accompanied by a "crisis of national trade unionism". [...] Trade unions must ask themselves whether they are willing and able to use this crisis as a chance to reform their organisations and policies, both nationally and internationally'. But this must not entail merely a *Zukunftsdebatte* among a privileged elite of policy-makers, detached from the rank and file. On the contrary, what is needed is a process which Offe and Wiesensthal (1985), in an analysis even more relevant today than when it was written, termed 'dialogical'. If interests are to be conceived and redefined in ways which highlight complementarities and encourage new solidarities, the bureaucratic, hierarchical politics characteristic of much traditional trade unionism must give way to more participative, interactive processes. For unions to survive and thrive, the principle of solidarity must not only be redefined and reinvented; workers on the ground must be active participants in this redefinition and reinvention.

Part II

Trade union solidarity across borders?

3 East–West European labour transnationalism(s)

Rivalry or joint mobilisation?¹

Magdalena Bernaciak

Introduction

Contrary to early pessimistic predictions (Marginson, 2006; Meardi, 2002; Vaughan-Whitehead, 2003), transnational union cooperation is emerging across the enlarged EU. Central-Eastern European (CEE)² unionists socialise with their Western European colleagues during European Works Councils' meetings (Kotthoff, 2005; Meardi, 2004). There is also evidence indicating that plant-level labour organisations from new and old EU member states coordinate their strategies during investment site selection and transnational restructuring (Bernaciak, 2010). Joint initiatives take place at the sectoral level from construction to the metal industry (Kahancova, 2008; Kahmann, 2006). The participation of CEE unionists in recent EU-wide protests against the liberalisation of EU service markets suggests that there exists consensus among European labour over the desired shape of social Europe (Gajewska, 2008).

Even this short overview of activities indicates that 'transnational labour cooperation' is an umbrella term encompassing a variety of union interactions. Upon closer examination, however, it emerges that cross-border initiatives are not only implemented at different levels of trade union organisation, but also bear distinctive features in terms of the character of commitments, level of resource mobilisation and membership engagement. It is thus important to distinguish between different types of cross-border labour interactions in the context of the enlarged EU and to outline their possibilities and limits. In this respect, it can be expected that East–West union relations might be generically different from contacts among unions from old EU member states. Specifically, persistent wage differentials across the enlarged EU can encourage interest in cross-border liaisoning, but might well raise new barriers to labour transnationalism, as indicated by Bieler and Lindberg in the introduction to this volume.

This study examines two instances of East–West union activism in the period following the 2004 EU enlargement: joint mobilisation against the EU draft Services Directive and plant-level union exchanges at GM/Opel. Out of recent union cooperation attempts, the two cases have arguably received the broadest media coverage and gained significant scholarly attention (see, for example, Gajewska, 2008 and Gilles, 2005 for the Directive case and Fetzner, 2008 and Banylus *et al.*, 2008 for the East–West labour contacts at GM/Opel). They both involved trade unions from

old EU member states as well as labour organisations from Poland, the biggest and most populous new EU member state. The inquiry is motivated by the fact that while the position of the Polish unions coincided with the stance of their Western European counterparts on the Directive issue, the two often diverged in the latter case, even though the mobilising effort was much higher at GM/Opel than during the anti-Directive campaign. Therefore, it is interesting to explore what accounts for the variation in the Polish unions' stance in these cases?

The chapter explains the variation by pointing to differing levels of workers' exposure to competitive pressure in the two contexts. The degree to which union constituencies compete with each other, in turn, determines the mode of union interactions, the time horizon of their actions and the degree of membership involvement in cross-border ventures. At GM/Opel, direct rivalry between plant workforces over future investments resulted in a zero-sum game. It made the Polish union adopt a short-term perspective and engage in cross-border interactions with the Westerners only when a scope for reciprocal exchange emerged. Moreover, the cross-border exchanges involved significant resources and remained conditional upon rank and file consent. In contrast, issues covered by the Services Directive did not involve direct competition between CEE and Western EU constituencies. The liberalisation of EU service markets in line with the country of origin principle would benefit only migrant workers, 'outsiders' from the viewpoint of the Polish unions; consequently, the Polish organisations adopted a long-term perspective and advocated the upholding of social standards in the West, since the latter constituted a public good that could be enjoyed in the future by both Western and CEE union members. Due to the long-term horizon and the public good character of the issue, however, the anti-Directive campaign featured little membership engagement. The chapter further argues that although plant-level interactions are to a large extent conflict ridden and the scope for agreement between individual union representations is relatively narrow, they serve as an important platform for East–West labour dialogue due to the presence of concrete commitments and rank and file legitimisation. In contrast, CEE unions' participation in EU-level campaigns on broad political economic issues remains to a large extent leadership-driven and is unlikely to provide a basis for sustained East–West labour exchanges.

The chapter is structured as follows. It first outlines the positions of Polish unions on the Services Directive and during plant-level union interactions at GM/Opel and reviews the literature on factors underlining cross-border union activism. Then it shows how the differing levels of competitive pressure in the two cases have shaped the mode of union interaction and secondary characteristics of transnational union exchanges. Finally, it discusses broader implications of the initiatives and briefly concludes.

Stop Bolkestein! and union interactions at GM/Opel: an overview of two initiatives

This section reconstructs the positions of Polish trade unionists on the draft Services Directive and during plant-level union exchanges at GM/Opel, thus

preparing ground for the analysis of the two cases. It is based on primary sources: press releases, union publications and archival materials, as well as on personal interviews conducted by the author between 2006 and 2008 with Polish and German unionists at the plant, sectoral and confederal level.

Union mobilisation against the draft Services Directive

In January 2004, the European Commission issued a draft version of the Directive on Services in the Internal Market, which aimed at liberalising service flows within the EU (European Commission, 2004). The draft legislation envisioned the so-called country of origin rule, stipulating that an individual or a company would be allowed to provide services on the territory of another member state on the basis of laws and regulations of his/her country of origin or the country of establishment, and was not obliged to abide by a set of rules existing in the host state. As argued by the supporters of the legislation, the planned act would enhance the free movement of services within the EU and boost economic growth thanks to the abolishment of administrative restrictions existing in individual member states (European Parliament, 2006). The opponents of the Directive, however, criticised its ultraliberal character and its supposedly anti-social dimension. According to trade unions, the introduction of the country of origin principle would lead to a pan-European ‘race to the bottom’ in the sphere of wages and working conditions, prompted by ‘letter-box companies’ that would relocate their headquarters to states offering the lowest wages and working conditions and subsequently expand their operations onto the whole EU territory (EMCEF, 2004).

Importantly, the objections to the liberal version of the Directive were voiced not only by Western European unions, threatened by the spectre of ‘Polish plumbers’ offering their services at dumping prices in Berlin, Paris or Brussels, but also by CEE labour organisations. While the two biggest Polish trade union confederations, *Solidarność* and *OPZZ*, welcomed the removal of administrative barriers impeding service providers’ mobility, they nevertheless opposed the country of origin principle. As for the *Solidarność* President, the Polish unions did not want their country workers to introduce unfair competition and prompt social dumping in old EU member states (Śniadek in EPSU, 2006). If they backed the liberal version of the act, they would be associated with ‘stealing bread from others’ (Niemiec in *Słowo Polskie Gazeta Wrocławska*, 16 February 2006:13) and accused of ‘undermining the achievements of several decades of social dialogue in [Western] Europe’ (Document No. 1).

A closer look at the Poles’ rhetoric suggests that their concern about the persistence of the European Social Model did not stem exclusively from the solidarity with their Western counterparts. The organisations asserted that the dissolution of social standards and collective bargaining systems in old EU member states would close the prospects for upward convergence of working conditions across the enlarged EU (Interview No. 2; *OPZZ*, 2006). They further argued that the country of origin principle would pose a threat even to current Polish standards if countries with lower wages and inferior working conditions joined the EU (Interview No. 1;

Niemiec in *Słowo Polskie Gazeta Wrocławska*, 16 February 2006: 13). Lastly, they warned against legal chaos that would emerge after the adoption of the country of origin principle; if services on the territory of a single member state were provided in accordance to 27 different legal orders, wage monitoring and health and safety inspections would be virtually impossible (Interview No. 1; Interview No. 2).

Both Solidarność and OPZZ communicated their anti-dumping position at the EU level. Solidarność President presented his confederation's stance during a conference organised by the European Trade Union Confederation (ETUC) in order to 'challenge the supposed East–West divide' related to the service liberalisation issue that could emerge in popular perception since the Polish government was a zealous supporter of the country of origin principle (EPSU, 2006). Before the European Parliament's debate on the Directive, OPZZ unionists presented their case to Polish socialist MEPs, urging the latter to vote against the liberal provisions of the act (ZNP, 2006). In addition, each union sent around 200 members for an EU-wide demonstration against the initial Directive version in Strasbourg in February 2006 (*Życie Warszawy*, 17 February 2006:12).

All in all, the positions of Solidarność and OPZZ on the Directive issue were fully congruent with the stance of their Western counterparts. Both Polish organisations openly rejected wage dumping and called for 'upward, not downward convergence' of social standards in the enlarged EU (OPZZ, 2006). Even the rhetoric of CEE and Western European unions bears striking similarities: Solidarność's plea for 'equal access, equal conditions, equal protection for all [. . .]' service providers and consumers in the Single Market (Solidarność, 2006) essentially repeats the German construction union IG BAU's demand for 'equal pay for equal work in the same place' (Eichhorst, 2005).

Union interactions at GM/Opel³

American-based General Motors acquired Opel in 1929. The company employs about 27,000 workers in Germany across four sites: car plants in Rüsselsheim, Bochum and Eisenach and a component factory in Kaiserslautern. Other GM plants in Europe are located in England, Belgium and Spain. In 1998, the company built a car factory in the Polish Gliwice, which puts out Opel Astra and Zafira models and employs about 3,000 workers, around 30 per cent of whom belong to Solidarność.⁴ The production process at GM Europe is organised in the form of platforms grouping locations eligible for manufacturing of a certain type of cars. Since the 1990s, management decisions concerning investment and capacity distribution have been preceded by a comparative assessment of costs and productivity performance of factories within each platform, which often spurred intra-plant competition (Hancké, 2000).

The establishment of the Polish site in the late 1990s posed a challenge to Western European plants, as the new location with significantly lower labour costs was expected to have a clear advantage during future site selection bids. Therefore, liaising with workforce representatives from Gliwice – hitherto a 'blind spot' on the map of European GM union contacts – represented the only possibility for

Western European unionists to avoid the East–West ‘coercive comparisons’. But despite the Polish presence in the GM’s European Works Council since the late 1990s, early Westerners’ efforts to coordinate strategies with Solidarność failed. In 2004, Gliwice entered a competitive race with the German plant in Rüsselsheim over the distribution of new Opel Zafira capacities. Since the lack of investment could threaten the existence of the Polish site, the plant-level Solidarność signed a concession agreement with local management to secure the inflow of new production, accepting a three-year wage freeze and lower wages for newly hired workers (Document No. 2). Consequently, they obtained the investment at the cost of the German site.

Only when the Zafira investment materialised could the threat of disinvestment or closure be dismissed in the short term. Accordingly, the Poles shifted their priorities from the goal for production increases towards pay rise demands and obtained the support of their Western colleagues at local wage negotiations. During a collective dispute over pay in 2007, the Poles asked the EWC chair, simultaneously the chair of the German Opel’s general works council, to serve as a mediator in the row (Eironline, 2007). He advised Solidarność to organise a short warning strike, which made the management accept most of the union’s demands (Interview No. 3). In a similar vein, the Poles used the assistance of their Western counterparts to devise an anti-outsourcing strategy, but they did not manage to prevent making their site ‘leaner’ (Interview No. 4; Interview No. 5).

In parallel with the local struggles, the Polish unionists adopted a more cooperative stance *vis-à-vis* their Western European colleagues. In 2005, they joined the Delta Group, initiated by the EWC to prevent a ‘beauty contest’ between five European factories of the Delta platform during the new Astra site selection process. Together with other locations, Solidarność signed the so-called European Solidarity Pledge (Document No. 3), promising not to lead separate talks with management before the final investment decision is taken and, after heated discussions, accepted maximum capacity utilisation levels for their plant in line with the EWC proposals. The Poles also rejected flexibility requirements set forth by management as a precondition for obtaining Astra production, even though they met most of the demands given the lean character of their site (Document No. 4; Interview No. 6). When the decision concerning production distribution of the new Astra excluded the Antwerp factory, the Polish unionists declared their solidarity with the Belgian colleagues, but they did not participate in the Action Day organised at all GM locations, scheduled on a Polish national holiday (Fetzer, 2008).

But despite Solidarność’s participation in the Delta Group, the union’s position often diverged from the policy line of its Western European colleagues. In 2005–6, Gliwice competed with the Spanish plant in Zaragoza over the manufacturing of the new Meriva model (Document No. 5; Document No. 7). The East–West discrepancy was also present during the debate over the so-called ‘share the pain’ strategy outlined by the EWC to avoid cancellation of a shift at the English site in spring 2006. Solidarność rejected the possibility of limiting production in Poland in order to save jobs at Western locations, arguing that Gliwice still needed additional investment to fully develop its potential (Interview No. 6; Interview No. 7).

While Western European unionists expressed their concerns over growing over-capacities in CEE, *Solidarność* welcomed GM's decision to assemble Chevrolets at the Warsaw factory belonging to its joint venture partner AvtoZaz, and vowed that they would 'resolutely fight for the increase of production volumes at *competitive* Polish plants' (*Solidarność Opel*, 2006). Overall, then, in contrast to the East–West anti-Directive mobilisation case, plant-level exchanges at GM/Opel featured multiple disagreements between the Polish and Western EU representations. What accounts for the differing position of Polish unions in the two cases and the resulting variation in Cooperative outcome?

Factors of transnational union activism

This section reviews different theoretical approaches to labour transnationalism and assesses to what extent they can explain the variation in outcomes in the two examined cases. It points to problems inherent in the structural and actor-centred accounts and argues for an interest-based perspective to the analysis of East–West European labour interactions.

To begin with, a number of authors highlight the importance of structural variables in assessing the prospects for transnational union action. Bieler (2005) posits that workers grouped in industries in which the production process is organised on a transnational basis have higher propensity to cooperate across borders than their counterparts from domestic sectors, such as health care and education. He substantiates his argument by claiming that workers from transnationalised branches have a longer and more intense experience of globalisation; more importantly, they have lost the ability to control capital from their national positions and are therefore 'pushed' onto the supranational action space. In a similar vein, Kotthoff (2006) points to the importance of a separate management division responsible for all European operations, which serves as an 'interlocutor' to the EWC due to its location at the same level of corporate organisation. Arrowsmith and Marginson (2006) further argue that the imposition of similar human resource management (HRM) practices across sites in different countries can increase the coherence of transnational union representation, which might then form as a unified 'labour front' against management's demands.

However, the structural theories fall short in accounting for the divergent outcomes in the examined two instances of East–West union interactions. Both cases involved industries organised on a cross-border scale: while foreign direct investment (FDI) and relocation practice constitute the main transnationalisation channels for the automotive industry, portable service sectors falling within the scope of the draft Services Directive transcend national borders as a result of corporate subcontracting and labour migration (Menz, 2001). Despite the equally high levels of internationalisation, the scope for agreement between Polish and Western EU representations was much narrower at GM/Opel than during the anti-Directive campaign, which highlights the need for further investigation.

Within an actor-centred approach to labour transnationalism, researchers argue that close cooperative links emerge as a result of socialisation among labour

representatives from different countries. Marginson *et al.* (2004) show that the European Works Councils that have had most influence on the management decisions can be found at companies where prior contacts between unionists and active networking were in place. Similarly, in his study of workers' responses to transnational mergers and related restructuring measures, Erne (2008) asserts that only the company at which labour representatives had known each other before the merger witnessed cross-border collective action. Analysing recent cooperation initiatives at GM, Gajewska (2008) claims that 'each successful dispute or action brought the workers together and strengthened the relationship, in turn developing into more institutionalization and socialization' (2008: 116).

But again, the socialisation arguments are not unproblematic. In the two examined instances of union interactions, the exact opposite to what the theories predict happened: while positions of Polish and Western European unionists were congruent from the very outset during the anti-Directive campaign, they continued to diverge at GM/Opel, despite the presence of an institutional framework created to enhance cooperation and continuous networking efforts in the latter case.

Bridging structural and socialisation explanations, interest-based accounts outline a concrete mechanism guiding unions' cross-border cooperative efforts. Logue (1980) argues that trade unions, like other interests groups, pursue the economic interests of their members. With the transnationalisation of business activities, workers are increasingly subject to pressures originating beyond state boundaries. To address these concerns, unions are compelled to enter the supranational arena. Through transnational engagement, however, each union caters in the first place to the interests of its own constituency. From this perspective, cross-border union cooperation can be regarded as a combined effort to service national workforces rather than an exercise in transnational solidarity.

Logue's theory might prove useful in accounting for the different outcomes in the two examined cases. In line with Bieler (2005), it posits that the diminishing scope of control over the national environment serves as a 'push factor' facilitating unions' cross-border involvement, but at the same time it highlights the salience of economic interests of union constituencies in determining the organisations' readiness to 'go transnational'. Following this line of reasoning, it can be expected that the divergent positions of the Polish unions in the two examined cases were related to differing levels of costs and benefits that would be incurred by unions' constituencies as a result of cross-border activism. The next section outlines the character of pressures that unions' constituencies were subject to in each case and reconstructs their interests under these specific circumstances.

Implications of East–West rivalry for transnational union relations

East–West EU relations are often portrayed as competition-driven. Significant labour cost differentials between old and new EU member states raise concerns over a 'race to the bottom' of wages and working conditions across the enlarged EU (see Bieler and Lindberg in the introduction to this volume; Lindstrom,

forthcoming; Marginson, 2006; Vaughan-Whitehead, 2003). However, this chapter argues that the extent to which workers are engaged in the competitive race varies significantly across different contexts. The extent to which union constituencies are subject to competitive pressure, in turn, determines the character of their organisations' transnational engagement.

This argument resonates closely with Kahancova's (2008) assertion that a competitive character of union relations within multinational corporations (MNCs) precludes the development of union cooperative ventures at the plant-level. Instead of linking different modes of union interaction with particular levels of union organisational structure, however, the present study focuses on the relation between the differing degrees of competitive pressure and types of cross-border union interactions. Analysing the positions of Polish trade unions during the anti-Services Directive mobilisation and at GM/Opel, it also shows how the degree of cross-border competition shapes secondary characteristics of inter-union exchanges, such as the time horizon of their activities, resource mobilisation and rank and file involvement.

Competitive pressure and the mode of union interactions

At GM/Opel, international benchmarking became the order of the day since the creation of an integrated European managerial unit and the introduction of parallel production strategy (Haipeter, 2006). Inter-plant competition became intense, while interactions between workforces at individual production sites took the form of a zero-sum game: a gain of new investment or increased capacities at one location was associated with a loss of existing or future production elsewhere. Given that each site selection process would bring immediate benefits or losses for the union constituency at the Gliwice factory, the Poles adopted a short-term perspective for their actions and made concessions to obtain new investments. To justify their non-cooperative stance, Solidarność claimed that Polish production sites needed to develop larger capacities and hire more workers to ensure the country's development and the gradual levelling of living standards with the West. Such arguments were raised during inter-plant contests over the Zafira and Meriva models and before the launch of the Chevrolet production at the Warsaw plant (Document No. 6; Document No. 7; Solidarność Opel, 2006).

The zero-sum character of interaction by definition excludes cooperation. Thus, the fact that union relations at GM/Opel took a cooperative turn after 2004 suggests that another mode of union interaction became more salient. By 2004, the Poles became aware of their strong competitive position among European plants; thanks to the low labour costs, they could expect that their site would not be omitted during the upcoming Delta site selection process. Consequently, they shifted their priorities from competition over production volumes towards the improvement of social conditions at their plant. This shift opened a window of opportunity for a reciprocal exchange between them and the Western unionists: while the Poles used the advocacy of their stronger Western European colleagues to enhance working conditions and/or job opportunities at their own plants, the Westerners

were reassured that the Poles would not underbid them. But the Poles continued to reject Western European initiatives that would hurt their immediate interests and it cannot be excluded that they might return to the concession bargaining policy in the future. The reciprocity-based East–West union cooperation seems to have emerged in the shadow of inter-plant rivalry, which, if temporarily contained, has not been fully eliminated (see Fetzer, 2008).

The draft-Services Directive case, on the other hand, did not feature direct competition between Western and CEE unions' constituencies. The unabridged liberalisation of the EU service markets in line with the country of origin principle would in the short term be beneficial for 'outsiders' – non-unionised CEE workers wishing to take up employment in old EU member states and offering their services there at lower wages. Consequently, the latter group, and not the CEE union constituencies, posed a competitive threat to Western European labourers. The distinction between 'outsiders' and 'insiders' was clearly present in the rhetoric of CEE unions. Both Polish confederations distanced themselves from the 'Polish plumbers': the Solidarność chair warned that the adoption of country origin principle 'opens the door to fictional employment, which in most cases amounts to social dumping' (EPSU, 2006), while the Secretary of the ZZ Budowlani construction union affiliated to OPZZ openly stated that the primary role of his organisation is to represent its members, 'and not the ones that go to the West and are not affiliated to any union' (Interview No. 1).

The short-term gain of the migrant workforce stands in sharp contrast to the long-term interests of the Polish union constituency, which laid in the gradual levelling of wage and working conditions across the enlarged EU. The adoption of the liberal version of the EU Services Directive, however, would put a considerable strain on the upward convergence scenario. The exacerbated wage competition in line with the country of origin principle could threaten social standards in Western European countries and thus destroy the Western European social 'archetype' towards which CEE countries were heading. In this respect, the preservation of high social standards in Western Europe created a sphere of common interests between labour organisations from old and new EU member states, a public good that the Polish unions' constituency would enjoy alongside with their Western counterparts once the social gap between the East and the West narrows.

Resource mobilisation and rank and file engagement

In the absence of prior communication with Western European unionists, Solidarność plant-level unit at GM/Opel devoted significant resources to transnational activities. At the leadership level, competent and experienced personnel took on the responsibility at carrying out transnational activities. For example, the union officer representing Gliwice in the GM's EWC speaks German, which enables him to foster informal contacts with the EWC chair and vice-chair. Beyond the two EWC sessions scheduled per year, he maintains regular e-mail contacts with Western European unionists and meets them on other occasions. Cross-border meetings are also regularly attended by the plant-level Solidarność

chair. Moreover, the union communicates its positions on international issues to its members. Articles devoted to transnational issues, as well as reports from EWC meetings and conferences are published in the union bulletin and on its webpage (<http://www.solidarnosc-opel.pl>). During the visits of the EWC chair and vice-chair to the plant, Solidarność engaged the workforce in discussions regarding the EWC activities and the role of the Polish plant in the company strategy. In 2007 and 2008, the Poles co-organised an exchange of lower-rank union activists with the Bochum plant, aimed at raising their awareness of cross-border dependencies between the plants and winning their support for cooperative activities (Document No. 8). Given limited financial and personnel resources, Solidarność's engagement in cross-border exchanges should be viewed as significant. Not only did the unionists actively participate in exchanges initiated by their Western European counterparts, but they also involved their constituency into discussions on transnational issues. In this respect, they made a conscious and sustained effort to create a dense net of cross-border contacts at the plant-level.

In contrast, the involvement of the Polish unions in the anti-Service Directive protests was characterised by a considerably lower level of resource and rank and file mobilisation. Two sets of arguments can account for this. First, as pointed out by Olson (1971), it is difficult to mobilise individuals to contribute to a public good. In the draft Services Directive case, it was rational for union members to free-ride on their confederations' opposition rather than to engage in protests that are costly from the individual perspective. Second, it was unlikely that workers would defend high standards that they will be able to enjoy only in a long-term perspective. As a result, the participation of the Polish unions in the anti-Directive campaign remained a leadership-driven initiative, during which the Poles used official communication channels to coordinate their responses with their Western European counterparts. This interpretation is best illustrated by the mode in which the Solidarność stance on the Services Directive was adopted. The ETUC communicated its policy line to high-ranking national union officials. Once verified by the union's lawyers and the Solidarność member working for the ETUC had been consulted (Document No. 9), the stance was essentially taken over by the union's Executive Committee as the official Solidarność position (Interview No. 8).

Against the above rendering, it can be argued that both Polish unions' statements were followed by their members' participation in European-level demonstrations against the proposed act. Nevertheless, caution in interpreting the protests as an instance of East–West collective action is well-taken. A closer look at the composition of the Polish group raises serious doubts concerning their stake and personal engagement in the debate on the Services Directive. At the Strasbourg manifestation in February 2006, OPZZ was represented by teachers and miners (*Życie Warszawy*, 17 February 2006: 12) and the Solidarność delegation consisted of food industry workers (Interview No. 2). While teachers might have been concerned with the liberalisation of public services, the other two groups would not at all be affected by the Services Directive and their participation in the protests suggests top-down delegation rather than spontaneous mobilisation over a common cause.

Legitimisation of trade union actions

Transnational activities of the plant-level Solidarność unit at GM/Opel had direct consequences for the plant's future, and thus for the fate of Gliwice employees. In order to obtain their support during the next union elections, the unionists had to legitimise their cross-border engagement vis-à-vis their constituency. On numerous occasions, low levels of membership support precluded the union's transnational involvement. For instance, the limited engagement of the Poles during the so-called European Action Days was at least partially due to the difficulty of convincing the workforce to stage the protest in solidarity with Western European locations (Banyuls *et al.*, 2008). During the Delta site selection process, it was extremely difficult for the Polish union to manoeuvre between the pressures by their Western European counterparts to set limits to newly arriving production volumes and the demands for as high as possible production inflows on the side of the workforce. When the Westerners urged the Poles to step down from the competitive race over Meriva, the latter rejected the plea arguing that '[in Gliwice] there is nobody who would step against the investment at our site' (Document No. 7).

In contrast, it was not necessary to obtain rank and file consent in the case of anti-Directive mobilisation, as the link between the unions' anti-Directive stance and the prospects for future increase in income levels in line with the West appeared too abstract for regular union members. Instead, it is more plausible to assume that EU-level union organisations, in particular the ETUC, expected the Poles to adopt the negative stance on the Directive, and that the Polish unions would have been subject to shaming from the side of their Western counterparts had they supported the country of origin principle. This interpretation finds support in the words of a Polish ETUC representative, who considers Solidarność's involvement in 'the European workers' community' as one of the main reasons behind its participation in the anti-Directive drive (Niemiec in *Słowo Polskie Gazeta Wrocławska*, 16 February 2006: 13). OPZZ, on the other hand, still held an ETUC candidate status at the time of the Strasbourg protests (Interview No. 1). It is difficult to imagine that it could take a different stance on the Directive issue than the organisation it wished to join.

East–West labour transnationalism: success or failure?

The previous section showed how the differing degree of competitive pressure across the two cases influenced the cooperative outcome and shaped a number of secondary features of transnational union interactions (see Table 3.1). It still remains unclear, however, how to assess the results of unions' cooperative efforts in the two cases. In particular, against which benchmark should one measure the value, or the 'success' of cross-border union activism? Is it a mere degree of congruence between unions' positions or economic gains from cooperation that matters? Or does the extent to which union interactions serve as a platform for future cooperation also play a role?

Drawing on the evidence presented in this chapter, it can be stated that not every

Table 3.1 Dimensions of union interaction: joint mobilisation against the draft Services Directive and union exchanges at GM/Opel

<i>Dimensions of union interaction</i>	<i>Plant-level exchanges at GM/Opel</i>	<i>Anti-Services Directive mobilisation</i>
Competition between union constituencies	Direct	Indirect
Time horizon of union action	Short-term	Long-term
Mode of union interaction	Zero-sum	Public good
Cooperation mechanism	Reciprocity	Common interest
Resource mobilisation	High	Low
Legitimising entity	Rank and file	ETUC

incidence of labour protests at the EU level should be regarded as an instance of genuine cross-border collective action. The case of the anti-Services Directive campaign shows that such joint mobilisation at the EU level might be orchestrated by the union leadership and gain little attention on the side of the union constituency, if the goals and benefits from the common protests appear too distant for an average union member. Given the limited interests of the union constituency in pan-European campaigns on broader political economic issues, also the accountability of labour organisations for such activities to their members is minimal. Instead, unions follow the policy line of pan-EU confederations, communicated to them in a formal manner during meetings of high-ranking officials. Assessed from this perspective, the mobilisation against the EU Services Directive is unlikely to serve a platform for sustained East–West exchanges beyond the leadership level.

Cross-border interactions at GM/Opel, on the other hand, involved concrete commitments, including the pledge not to lead local negotiations during the site selection process – a significant achievement given the earlier underbidding practice. Transnational politics penetrated all levels of CEE union membership: while union leaders presented their stances during EWC meetings, low-rank union officials participated in inter-plant exchanges and union members gave their consent for cross-border actions. Although disagreements continued to emerge parallel to cooperative exchanges and the level of congruence between the positions of the Polish union and its Western counterparts was relatively narrow, this is perhaps the limit as far as labour transnationalism can get in the era of transnational competition. The fragility of interest-driven cooperation notwithstanding, it has to be acknowledged that such cross-border union interactions constituted a transparent exchange, legitimised by all involved actors. In this respect, it bears well for the future of union contacts at plant-level.

In the light of the evidence from the GM/Opel case, it would perhaps be too early to accept Kahancova's (2008) pessimistic conclusions and dismiss the role of plant-level union interactions in improving working conditions in the enlarged EU. Even in a competition-driven setting, there is scope for reciprocal exchange between

labour organisations from old and new EU member states. As a consequence of union exchanges, not only East–West underbidding can be contained, but also working conditions at CEE company subsidiaries might improve significantly as a result of Western European unions' intervention. It is more difficult to envisage similar developments at the sectoral level due to the weakness of sectoral collective bargaining and limited resources of sectoral union organisations in CEE.

Conclusions

This chapter set out to analyse two instances of cross-border interactions between Polish and Western European unions: joint mobilisation against the draft Services Directive and union relations at GM/Opel. It showed that the two initiatives differed in important aspects, including the mode of union interaction, the time perspective of union action, as well as the level of resource mobilisation and rank and file engagement. The chapter argued that these systematic differences were related to the degree of competitive pressure that union constituencies were subject in the two settings. By documenting this variety, the study sought to open the 'cross-border labour cooperation' black box and advanced scholarly understanding of different forms of labour transnationalism in the enlarged EU.

But the inquiry did not stop at delineating the differences between the two initiatives. The second step involved the assessment of cross-border efforts from the perspective of prospects for sustained interactions that they have opened. The chapter argued that despite a seemingly higher level of congruence between union positions on the Services Directive campaign, union cooperation on this issue remains relatively 'empty', as it did not involve contacts between union members from different countries beyond high-ranking union officials. In contrast, union interactions at GM/Opel, if not conflict-free, were related to concrete commitments on the union side, engaged activists at different levels of the union hierarchy and thus bode well for future engagement in similar cross-border actions.

Finally, the study corroborated Kahancova's (2008) finding that plant-level union interactions tend to be competition-driven. However, it also showed that union relations within MNCs are not doomed to remain hostile and that unionists can develop cooperative links based on reciprocal exchange. The chapter posited that such cross-border contacts might contribute to the improvement of working conditions in the 'new' EU thanks to the assistance offered by Western European organisations to CEE unions. They can revitalise a shop floor union movement in new EU member states despite the weakness of sectoral and national structures, thus creating 'islands of union prosperity' at MNCs' subsidiaries across CEE. More research is needed to analyse different types of union interactions in the East–West European context and to establish to what extent these activities differ from the ones observed in the homogenous Western European setting. It would be also interesting to explore how changing economic conditions, in particular the recent global financial and economic crisis, have influenced transnational union relations.

Interviews

Interview No. 1: Secretary, ZZ Budowlani; Budapest, 4 April 2006.

Interview No. 2: Head of International Office, Solidarność; Gdańsk, 3 January 2007.

Interview No. 3: Chair of the European Works Council (EEF) at General Motors; Rüsselsheim, 29 November 2007.

Interview No. 4: Chair, Solidarność at Opel Gliwice; Gliwice, 6 November 2007.

Interview No. 5: Deputy Chair, Solidarność at Opel Gliwice; Gliwice, 6 November 2007.

Interview No. 6: IG Metall activist and works council member at Opel Bochum; Bochum, 9 May 2008.

Interview No. 7: Former Coordinator for General Motor, IG Metall and European Metalworkers' Federation; Frankfurt/Main, 24 June 2008.

Interview No. 8: Officer at the Internal Market unit, European Trade Union Confederation; Brussels, 3 October 2007.

Documents

Document No. 1: 'Stanowisko Związku Zawodowego "Budowlani" i Sekretariatu Budownictwa i Przemysłu Drzewnego NSZZ "Solidarność" w sprawie swobody przepływu siły roboczej w budownictwie i swobody świadczenia usług w tym sektorze'; joint statement issued by Solidarność's Wood and Construction Section and ZZ Budowlani construction union affiliated to OPZZ outlining the organisations' position on the free movement of workers in Europe (February 2006).

Document No. 2: 'Porozumienie w sprawie negocjacji płacowych w razie otrzymania do produkcji przez Opel Polska Modelu Zafira'; concession agreement concluded between the Opel Polska Management and the plant-level Solidarność preceding the arrival of the new Zafira model to Gliwice (07 May 2004).

Document No. 3: 'European Solidarity Pledge'; solidarity declaration signed by unionists representing all European GM/Opel production sites (7 December 2005).

Document No. 4: 'Zgodność katalogu horroru Zarządu GM z przepisami prawa krajowego, krajowymi kulturami IR oraz stanowiskiem rad związkowych/pracowniczych', Delta Group document outlining the compatibility of GM management's demands with labor law and industrial relations cultures of the Delta Group members (23 May 2006).

Document No. 5: 'Stanowisko w/s złożonej propozycji podpisania Europejskiej obietnicy solidarności w procesie wyboru zakładu mającego produkować model Merviva II', statement issued by Solidarność at Opel Gliwice rejecting the European solidarity pledge Meriva, thus running counter the official EWC position (September 2005).

Document No. 6: Solidarność's statement made upon the arrival of the Opel Zafira model to Gliwice, presenting the new investment as a 'huge chance for Gliwice, for the region (. . .), for Poland' in view of the persistent high unemployment (2004; no date available).

Document No. 7: Notes of the Polish EWC representative made during the Delta Group meeting in Frankfurt/Main, outlining the motives for Solidarność's rejection of the European Solidarity Pledge Meriva and pointing to high unemployment, high workforce expectations regarding the new investment and the trade union's responsibilities vis-à-vis its constituency (07 October 2005).

Document No. 8: Final report from the project 'Arbeitnehmersolidarität von unten', prepared by scientific assistant of the Opel Bochum works council, outlining the goals and achievements of cross-border exchanges between Polish and German union activists from Gliwice and Bochum plants (January 2008).

Document No. 9: Email exchange between Solidarność's International Office and Solidarność's European Trade Union Confederation official responsible for the Internal Market, considerably modifying the draft version of Solidarność's official position on the Services Directive (29 September 2004).

Notes

- 1 I would like to thank Svetoslav Salkin and the members of the Political Economy Research Group at CEU for their comments on the chapter. The usual caveats apply.
- 2 The terms 'Central-Eastern European states' (CEE) and 'new EU member states' refer to the 10 post-communist countries that joined the EU in 2004 and 2007. Old EU member states are Western European countries that were EU members before the 2004 EU enlargement.
- 3 Bernaciak, M. (2010) 'Cross-border Competition and Trade Union Responses in the Enlarged EU: Evidence from the Automotive Industry in Germany and Poland', *European Journal of Industrial Relations* 16/2: 119–135, offers a more detailed analysis of the GM/Opel case and East–West union interactions in the car industry.
- 4 *Solidarność* in this subsection and in subsequent subsections devoted to union interactions at GM/Opel refers to the plant-level union representation at the Opel factory in Gliwice.

4 Detours of solidarity

Experiences from Ericsson in Colombia

Jonas Sjölander

Introduction

In 1976 the members of Sindicato de Trabajadores de Ericsson de Colombia (*Sintraericsson*) elected a new board. The Swedish-owned company Ericsson had since the early twentieth century gradually built up an extensive production of telephone exchanges in Colombia. The previous union at Ericsson de Colombia (EDC) had been loyal to the company but the new union leaders took a more radical position, which resulted in a number of conflicts with company management. In 1978 and 1979 the members of the board of *Sintraericsson* wrote a number of letters to the Swedish Company Union Group, a confederation of Swedish unions inside Ericsson. *Sintraericsson* wrote about the dismissals of unionists, starvation wages and lack of respect for workers and human rights. They appealed for support in their conflicts with the local management of EDC. When the answer to the letters came at last, it was not the unreserved, whole-hearted support that *Sintraericsson* had hoped for.

In Spring 1979 two *Sintraericsson* activists went to Sweden, Julio Villafradez and the former chairman Luis Moreno who had recently been dismissed by EDC. They went to Sweden to make contacts and inform their Swedish union comrades about the hard situation at Ericsson in Colombia. Later the same year the Confederation of Swedish Trade Unions LO organised a Latin America course that included a study tour to Colombia. Two representatives from the company union group at Ericsson, Åke Andersson and Björn Svedberg, joined this tour. In addition to taking part in the study tour Andersson and Svedberg had a mission to discuss the problems at EDC with the board of *Sintraericsson*. Andersson visited Colombia and EDC once more in 1981. At that time he travelled together with the international secretary of the Swedish Metalworkers' Union *Metall*, Torsten Wetterblad and Per-Olof Edman from the company union group at Electrolux in Sweden. When they met their Colombian colleagues they presented the text of a draft agreement between *Metall* and *Sintraericsson*. The draft stated that *Sintraericsson* would (1) have its contacts to Swedish unions through *Metall*, (2) refrain from contacts in Sweden outside the established labour movement and (3) join the Colombian national union Ultramicol, which was affiliated to the International Metal Workers' Federation (IMF). In exchange, Swedish *Metall*

would recognise *Sintraericsson* as the representative workers organisation at EDC and extend full support to its struggles.

In presenting the proposed agreement, Ake Andersson appealed for worker unity and referred to Swedish experiences from struggles, compromises and social contracts. However, *Sintraericsson* remained reluctant to join Ultramicol, which it regarded as a company friendly 'yellow' union. After a series of contacts the efforts to create conditions for joint solidarity faded away, while the attitude of EDC management towards *Sintraericsson* got tougher. In 1983 negotiations for a new wage contract broke down. *Sintraericsson*'s demands for safe working conditions, decent wages and that the union should be respected as negotiation partner by management sharply contrasted with management attempts to impose flexible terms of employment and to establish an alternative organisation to negotiate with. A strike was broken up by police with guns and teargas and the union leaders were dismissed. The Swedish *Metall* makes a declaration of support which reaches Colombia months after the strike had been broken up. In practice, *Sintraericsson* was left without support from the Swedish unions. The ensuing dismissal of 76 unionists signified the deathblow for *Sintraericsson*. Most of the *Sintraericsson* activists were swept away and the ones that remained were frightened into silence. Why, then did this effort towards transnational solidarity fail?

This chapter is predominantly based on my doctoral thesis (Sjölander, 2005). Methodologically, research has been conducted through archive studies and interviews according to oral history theories. This method should also be regarded partly as an attempt to analyse the events in a perspective of history from below – and a history of society in a structural sense. It is impossible, and even pointless, to reconstruct the past in all its complexity. Nevertheless, the voices of unionists and other actors contribute to a deeper understanding of why the relations between the company union group at LM Ericsson in Sweden and the independent union *Sintraericsson* in Colombia did not evolve into a fruitful cooperation between 1976 and 1984. The causes and effects are to be found at overreaching structural levels as well as in interpersonal individual relations. Ideological, real politics and organisational considerations were decisive for the Swedish unionists' attitude to *Sintraericsson* and how relations developed during these years. Furthermore – language problems, other communication problems (like company obstructions, disinformation and disrupted negotiations), organisational prestige, personal chemistry and last but not least ignorance also had a devastating influence on the way the relations developed.

The examined relations took place in a time that from a trade union perspective was characterised by uncertainty and anxiety about the future. Technological and industrial processes of transformation in Sweden as well as in Colombia had intensified resulting in a decreasing demand for manual labour. The introduction of the electronic AXE-system at LM Ericsson industries constituted a significant step away from labour-intensive telecommunications systems.

The Colombian context

A major technological transformation at LM Ericsson – the changeover from electro mechanic switches to electronic switches (AXE) – coincided with an economic crisis and an overall process of disintegration in Colombia. Local EDC management took advantage of the political unrest and instability as well as of the absence of functional legislation to obstruct and, finally, destroy *Sintraericsson*.

Not only local management was acting. Internal reports between EDC and the executive board in Sweden show that the parent company carefully followed the course of events in Colombia, and the correspondence reveals that management in Sweden intervened if necessary. The Swedish management took active part in drawing up strategies to obstruct union activities at EDC. The objective was to 'colombianize' the enterprise, and transform EDC into an integrated part and an actor within the existing social structure of the country in order to reach and maintain dominance on the Colombian telecommunications market.

The Swedish context, labour internationalism and its restrictions

Relations between *Metall* and the Swedish multinational corporations (MNCs), including Ericsson, deteriorated towards the end of the 1970s and beginning of the 1980s. *Metall* experienced a number of serious conflicts in Sweden during these years, making the events in Colombia appear less important than before. In its attitude towards *Sintraericsson*, real politics and organisational considerations became more crucial for *Metall* and the company union group than moral ones. However, as we shall see, the picture is ambiguous.

A major result of my research is that it gives a partly different conclusion from earlier research concerning the interaction between the national positions of strength and internationalism. It is when *Metall* takes a more offensive position towards the employer side during the 1970s that the federation also attaches great importance to internationalism and engages in the surrounding world. Earlier research has often stated the opposite: a strong national Labour movement leads to weak internationalism and nationalistic self centrisms.

In the 1970s internationalism was connected to radical demands for wage earner funds and increased worker influence in the MNCs. Internationalist standpoints are motivated by fear that international capital will strengthen its positions, but also by hopes that the labour movement will not only defend positions already achieved but strengthen its influence through labour internationalism. Discussions and decisions at the *Metall* congresses in the period 1973–1981 emphasise the correlation between internationalism, economic democracy and legislation to increase worker influence over multinational companies. However, the practise did not entirely correspond with theory. While documents and congress debates emphasised moral standpoints, practice was to a great extent handled in accordance with realistic, institutional and organisational positions. The radical pathos that characterised the 1981 congress was not without restrictions and the examined relations between

Metall Sintraericsson show indeed that theory and practice sometimes contradict each other. *Metall*'s efforts to develop a kind of third position, independent of the antagonistic powers of the Cold War, did not have any effect on its loyalty to the IMF. The position of *Metall* was that all contacts should be held inside IMF.

International solidarity and the real world

When Åke Andersson and other participants in the 1979 Latin America course were back home in Sweden, they met to evaluate the study tour and wrote a play called 'Why do they bark at us?' as part of a report on the conditions at the Swedish corporations in Colombia. The play is an example of a moral and ideological expression of internationalism. In this play it is obvious that moral aspects were regarded as fundamental. Together the Colombian and Swedish unions shape a common arena of solidarity without any reservations shaped by real politics. International solidarity appears as the essence of internationalism, directed both inwards and outwards; not only as a propagandistic or rhetoric phenomenon but as a working tool. In fact, international solidarity constitutes the basic link and the releasing power of internationalism.

A socialist rhetoric, with echoes from the Swedish Social Democratic Party programme from 1975, points to another kind of society where the power over production is put 'in the hands of all the people'. This sentence originates from Ernst Wigforss, Minister of Finance in the 1940s and 1950s and these ideas reappeared in the 1970s, when economic democracy and wage earner funds were concrete proposals inside the Swedish labour movement. However, the road to economical democracy presupposed worker unity and dialogue, which was Åke Andersson's main argument when he discussed the situation with the representatives of *Sintraericsson*: 'if we act alone we are weak, but together we'll be strong' (Sjölander, 2005: 205). But in the real world the conditions for unity and dialogue were weak and not very favourable. The asymmetric relations in the capitalist world between centre and periphery also characterised the relations between the unions in Colombia and Sweden.

***Sintraericsson* is getting marginalised**

In two internal company memoranda of 1979, the critics of Ericsson's activities in Colombia are mapped and analysed. These critics, as well as the union activists at EDC, were described as connected to terrorism and 'subversive leftist elements' (Sjölander, 2005: 192–99). The memoranda also emphasised how important it was that this information was transferred to the company union group. Ironically enough the memoranda also pointed to *Metall* as responsible for much of the critique and it was described as a major contributor to the action against EDC. The radicalisation of *Metall* during the 1970s and its internationalism were regarded as fraternisation with communists. At the same time, however, *Metall* was also challenged by leftwing groups with connections to *Sintraericsson*, accusing it of labour imperialism. *Metall* interpreted this critique as an attack on the reformist

labour movement, which resulted in a defensive position. The consequences were devastating, not at least for the Colombian Ericsson workers, since the attention was displaced from conditions at EDC to these accusations.

Disinformation, relations to IMF and suspicious attitudes towards the left outside Swedish social democracy delayed action from *Metall* and the company union group and made its position vague and ambiguous. EDC as a prime organisation had the information advantage and its internal correspondence was never disturbed. A significant example is the meeting between *Sintraericsson*, *Metall* and the company union group in 1981, when *Metall* advised *Sintraericsson* to try to create better relations with EDC. *Sintraericsson* tried this during the following round of negotiations. But *Sintraericsson*, *Metall* and the company union group were deceived. In the internal correspondence it is obvious that the results of the negotiations were very positive from Ericsson's point of view. The rate of wages was as much as 19 million Colombian pesos lower than estimated in the budget for the coming two years. Crucially, *Metall* tried to persuade *Sintraericsson* to join one of the IMF-affiliated organisations in Colombia, either *Unión de Trabajadores de Metalúrgicos y Mineros de Colombia* (*Utrammicol*) or *Federación de Trabajadores de las Metalúrgicas, Electricas y Mecanicas de Colombia* (*Fetramecoll*). At their meetings the *Metall* representatives stressed that in the long run it was impossible to accomplish major changes without union unity. This was stressed despite the fact that the members of *Sintraericsson* had very bad experiences with the Colombian IMF affiliated federations. The members of *Sintraericsson* regarded *Fetramecoll* and *Utrammicol* as 'yellow', company-loyal and corrupted, and they had good reasons for doing so. But *Metall* insisted that membership in one of these organisations was necessary, if *Sintraericsson* wanted whole hearted support and solidarity from the Swedish unions. This standpoint is one aspect of a phenomenon which can be described as 'the Conditional Practice of Solidarity'. This case can be seen as an obvious pattern of missionary unionism. *Metall* and the company union group took for granted that their judgments were the right ones. Consciously or not, the experiences from the Swedish labour movement became the foundation of evidence, while the judgments and experiences of the Colombian unionists were rejected or neglected. On the other hand, critics of the Conditional Practice of Solidarity came to draw attention away from the situation and the hard conditions for the workers at EDC into a discussion about the policies of *Metall*, which was accused of labour imperialism. Leftist groups and the media in Sweden described *Metall* as attempting to export Swedish class collaboration to Colombia. However, the accusation of labour imperialism must indeed be questioned and nuanced. It was Swedish capital that ruled behind the gates of the factories in Sweden as well as behind those that enclosed the Swedish factories in Colombia.

Obstacles to cooperation and solidarity

Paradoxically the attempts at unity were a major problem for transnational solidarity. It was hard for the company union group in Sweden to entirely free itself

from the forms and cultures of negotiation that had developed there and which constituted a major part of its organisational identity. The idea of the 'historical compromise' in Sweden became an obstacle rather than an asset for cooperation between Swedish and Colombian labour. Ericsson's ability to obstruct the relations between the unions in Sweden and *Sintraericsson* depended less on their skill to dupe and more on the 'constructive' and collaborative relations between companies and unions in Sweden, dating back to the so called historical agreement in Saltsjöbaden in 1938. The Company Union Group depended on Ericsson and did not know which version was the correct one – the description that was made by Ericsson or *Sintraericsson*? The analysis shows certain parallel changes in Sweden and Colombia during a phase that is sometimes called the Third Industrial Revolution. Relations between *Sintraericsson*, *Metall* and the Company Union Group at Ericsson reveal their dependence on the global processes of accumulation and production. But great differences are also apparent, which must be understood in the light of the different positions of Sweden and Colombia in the capitalist world system. The shape of the critique is of course closely connected to the spirit of the time and social climate. It is also important to make a distinction between the internationalist practices and the moral and rhetorical standpoints that are stressed at labour movement congresses and in principal speeches. The relations between EDC and *Sintraericsson* were never characterised by mutual understanding. On the other hand, the relations between the Company Union Group and Ericsson could be characterised as relatively respectful and the formal mutual understanding between the company and the Company Union Group were never shaken to their foundations. It should be stressed that *Metall* went through a period of radicalisation during the 1970s until its congress in 1981, which was manifested in contributions of anti-systemic critique and socialist arguments. This tendency became weaker during the retreat of the neoliberal decades that followed. *Metall* and the Company Union Group were very critical towards the Swedish MNCs' behaviour in the Third World. Their standpoint was grounded in experiences from the Swedish context and the position that the Swedish labour movement had conquered through reformist strategies and values. However, the experiences of the Colombian Ericsson workers were different and this of course had an effect on their attitude and their strategic standpoints.

On one hand it is a question of how *Metall* and the Company Union Group have understood their own history and their role in the international labour scene and their ideas about unions in other parts of the world. On the other hand it is a matter of subordination and social gaps in the world system, which has also characterised the organisational structure in the international federations. The IMF, for example, was clearly dominated by the northern American and the West German Metalworker Unions. It was the strong organisations in the core of the world system that wrote the agenda and decided the track for the organisations in the semiperiphery and periphery. The organisations in Latin America could only expect support and solidarity from the IMF if they declared their loyalty and became affiliates. This was also equivalent to accepting the strategies that had been worked out by the strong unions in the core of the capitalist world system.

One interpretation is that the unions in Latin America were denied and refused to act on the basis of their own experiences and conditions. From the independent unions', like *Sintraericsson*, point of view it was as having to choose between two evils: marginalisation, which meant no moral or economic support from the strong IMF affiliates, or subordination and marginalisation, which implied renunciation of their own strivings. In order to maintain the pressure on their employers they needed both moral and economic support as well as the independence to make their own choices on the basis of their own experiences. Swedish unions were not unconscious of this kind of dilemmas. For example, *Metall* and other Swedish unions avoided concepts such as 'union aid'. Instead they used the term Union Corporation and International Solidarity, in order to underline the mutual interdependence between unions across borders. The creation of an equal Labour Internationalism was often stated as a main objective – small and weak unions were not supposed to be run over by strong and rich unions.

But in practice *Metall* and the Company Union Group acted in ways that confirm the picture of the Swedish labour movement's ideas of 'the other'. One can perceive a sense of an idea that the Swedish concept of labour activities was regarded as more successful than in other parts of the world. The Swedish unionists could say so and refer to the negotiation system in the well-arranged 'Swedish model', the extremely high degree of union members, the successful welfare state, labour legislation and the law concerning rights of participation in decision-making that were realised in the 1970s. *Metall*'s position of strength in relation to the employers enabled an active and offensive conduct, not at least regarding international questions, which were also connected to the demands on economic democracy. As one contribution in this offensive *Metall* established international connections and the cooperation with other Nordic metal worker unions became an important base for the establishment of a 'Third Standpoint' in the international labour federations during the cold war. Among unions in the periphery and semiperiphery and among unions dominated by euro communists, this meant that there was a strong and well organised ally, which at least to some degree stood outside the power politics of the cold war. But the balancing act by *Metall* inside the IMF also implied that organisations outside the IMF could not be embraced with whole-hearted and effective support. The moral support to *Sintraericsson* that could be offered by *Metall* was pretty empty. In practice, strategic and realistic considerations prevented more direct economic and industrial relations support.

Many causes of failed internationalism

Metall were faced with a number of different strategic choices that ended in a lack of support for *Sintraericsson*. It is not enough to analyse the events isolated from a political and societal context in order to understand why the relations between *Sintraericsson*, *Metall* and the Company Union Group did not develop into a real cooperation. Far too many obstacles were raised towards the realisation of united and powerful actions against EDC's anti-union strategy. In the end *Sintraericsson* lost the struggle. Even though this must be regarded as a failure from

an internationalist point of view, discussions were held and some kind of bonds arose between a radical independent union in Colombia and the Company Union Group in Sweden. If it had not been for the Conditional Practice of Solidarity, the winding detours and the lack of communication, these relations might have developed into real international cooperation (Sjölander, 2005: 151ff.). It is of course not possible to generalise from this isolated case. The reality was more complicated than that. Nevertheless, one can also find examples of ideas and attitudes that do not confirm a picture of Swedish unionists totally captured by the Swedish horizon in their contacts with the labour movement in Colombia.

Metall was a target for critique from leftist groups and journalists in Sweden, while Ericsson kept in the background and could avoid the accusations by referring to the 'independent' local management in Bogotá, or through dismissing the critique as communist propaganda. One of the few occasions after 1979 when Ericsson addressed the criticism was in a radio programme, in which the staff manager Nils Svensson took part. The inconsistencies were obvious when he on the one hand referred to the local management and on the other insisted that 'we have not done anything wrong in Colombia'. He contradicted himself when he referred to the independence of EDC and kept on insisting that 'we were not to be blamed for anything' (Sjölander, 2005: 201–2). It is important to remember that the local management in Colombia was Swedish and that the managing directors were recruited inside the company and after their duty in Colombia moved to other Ericsson establishments in the world. Raimo Lindgren for example, who was managing director at EDC in the beginning of the 1980s, later became managing director at Ericsson in Spain. It is noticeable that in Spain like in Colombia, there were tough conflicts between the union and management between 1989 and 1991: strikes, occupations of factories and similar accusations like those that were directed against EDC a couple of years earlier, were now directed towards Ericsson in Spain (Sjölander, 2005: 31–32).

It was hard for the unionists from *Metall* to defend themselves in a convincing way, when they were accused of union imperialism in different radio programmes and news papers. Sometimes they were at a loss for an answer as when the international secretary Jan Olsson, for example, could not say more than: 'What do you suggest that we should do?' as an answer to a question of why *Metall* did not act more sharply towards Ericsson in the Colombian case. Perhaps *Metall* and the Company Union Group felt powerless since the group executive board of Ericsson totally ignored the protests against personnel policy in Colombia, which *Metall* had actually conveyed continuously.

The uneven relative strengths between the corporation and the labour organisations clearly appear in a world system perspective. The business and the links between Ericsson in Colombia and Sweden were not disturbed by different views on how to accumulate profit. Ericsson established business connections in Colombia and had good knowledge of the Colombian conditions. Ericsson was not driven by moral considerations and could on the one hand rely on Colombian laws and values and on the other refer to overreaching 'economic laws' in order to justify the personnel policy and the dismissals at EDC. The advantage of the

corporation in relation to *Sintraericsson*, *Metall* and the Company Union Group had great significance to the outcome of the relations between the unions in Colombia and Sweden. Finally, the transnational Labour structure was indirectly marked by the structures that *Metall* and other Labour organisations as a matter of fact were struggling against. Differences in conditions concerning union activities in centre and periphery brought about almost insuperable obstacles to realise powerful labour opposition that signified a real challenge towards transnational capital and MNCs. The structural differences resulting from uneven and combined development, identified in the Introduction to this volume, undermined the potential for transnational solidarity.

Perspectives for the future

Ericsson closed down its manufacturing activities in Colombia in 1990. It is however still a major operator on the Colombian telecommunications market. Nowadays, Ericsson has not only developed behavioural codes on business ethics. The company often refers to the UN's general declaration on human rights and has prepared a range of behavioural codes that for example regulate working hours, minimum wages and union rights. The reality however stands in sharp contrast to the contents of the internal ethical guidelines (Sjölander, 2008: 220–38).

One important difference compared with the general situation at the end of the 1970s is that production, including in Sweden, has almost exclusively has been outsourced, for example to Flextronics. Thereby, the conditions for cross-border trade union cooperation have been seriously disturbed. Unions at the outsourced workplaces in the core countries have been linked more strongly to their local contexts. The possibilities for cross-border union interaction have been cut drastically. Companies striving for flexibility on the labour market has resulted in an apparently unsafe situation for large groups of employees. This includes investment in skilled core groups of employees and systematic use of short time contracts. The threat that the company could anytime move to another part of the world makes union positions difficult.

In the peripheral areas of the world the connections are clear between low salaries, long working days and the lack of union and human rights. Outsourcing of production became the short-term solution to Ericsson's dilemma: not to mess with production at all. Without responsibility for the direct production the corporation did not need to bother. The development at EDF can thus be seen as a part of a radical restructuring process within Ericsson. Through the disposal of responsibility for direct production – the outsourcing to local manufacturers – a new system of outsourced companies can be created worldwide. Anonymous and untouchable for union claims and criticism, these companies pursue a restructuring process that leads to further dismissals and worsening working conditions for workers around the world. This restructuring process coincides with a neoliberal era that still transforms and redefines the world in accordance with the Friedmanian paradigmatic doctrines of privatisation and deregulation. Companies like Ericsson do not hesitate to operate in, and adapt to, deeply unequal societies characterised by

corruption and exploitation. The assertion of the brilliant conquest of the world by Swedish technology in the past and still today carries an asocial backpack that must be studied further.

Nevertheless, there are also some positive changes in the conditions for cross-border trade union internationalism. The Cold War at the international union level is a problem of the past. This opens up new possibilities perhaps in collaboration with other social movements. The creation of a new international trade union structure that *does not* reflect the structural gaps between core and periphery is a challenge and a hope for the majority of the workers from North to South. In Sweden 'the historical compromise' between labour and capital appears more and more as an illusion. This means that several of the obstacles that existed between *Sintraericsson* and Swedish *Metall* probably no longer prevent cross-border labour internationalism. The most serious obstacles today are to be found in the worldwide neo-liberal hegemony, the informalised and deregulated labour market, and the decreasing rate of unionisation in the core as well as periphery. *Sintraericsson* does not exist anymore and the rate of organisation in Colombia has decreased seriously during the last years. Many unionists have been killed or forced into exile. A grave internationalist responsibility rests on the shoulders of the unions in other parts of the world that still have influence and possibilities to organise the working forces on national levels. But this responsibility does not necessarily involve teaching or dictating the conditions. Solidarity actions have to be based on reciprocity.

5 Building rank and file activism

A study of the Global Action Day Campaign in the history of the International Transport Workers' Federation

Mac Urata

Our rank and file members are now aware of the need for international solidarity action against globalisation. We have sent the message to our government and employers that we are not alone in our struggle.

R. R. Chandra, Bangladesh Truck Chalok Sramik Federation

The issue of drivers' fatigue has been raised quite substantially to the public and media through the campaign. The media can now cite the possibility of driver's fatigue in an accident, where as in the past they would say the cause was 'unknown' or 'still under investigation'.

P. Baranowski, Ver.di, Germany

We have regained confidence of the workers at workplaces. Through the Annual Action Day campaigns, we have increased our membership by 150 per cent.

J. S. Pino, FENASICOCH, Chile

Fatigue Kills

The 9th June 1997 marked the first International Action Day that the International Transport Workers' Federation's (ITF)¹ and its road transport workers' affiliates organised under the slogan 'Fatigue Kills' with the principle objective 'to put in place and enforce acceptable limitations on drivers' duty time and rest periods' (ITF – Road Transport Workers' Section, 2000: 2). What started as a day of action for truck, bus and taxi workers in 13 countries has turned into a week of events in mid-October every year. Based on the reports from the affiliates to the ITF, unions in more than 100 countries have taken part in the Action Day campaign at least once. That is 90 per cent of the Section's membership. It estimates that the campaign has mobilised more than one million people altogether.² It has become

one of the most successful Action Day campaigns in the international workers movement. It prompted the ITF's railway workers to campaign for 'Safety First' when their industry was going through massive changes under privatisation and deregulation. Since 2001, women transport workers have actively and collectively participated in the International Women's Day, 8 March. Other action days have followed³ over the past decade and these efforts have created a new dimension in the ITF, which has always advocated workers' activism. The main purpose of this paper is, therefore, to examine this new style of campaign by focusing on the Road Transport Workers' Action Days.⁴ This document will identify how it was developed, what successes it has achieved and what shortcomings it still has. Several suggestions will be made as to how this campaign could progress in the future. Finally, the paper will identify a unique feature this campaign has attained in the history of the ITF by comparing it with several key industrial and political activism in the 113 years of the Federation.

The ITF was founded in July 1896 at a fringe meeting of the International Socialist and Trade Union Congress⁵ held in London (ITF, 1996a: 11). What triggered this meeting of the Second International to form this federation was the victory of the Dutch dockers' strike in Rotterdam earlier that year. In solidarity, British seafarers in the port had refused to load or unload any cargo. It turned the tide in favour of the Dutch dockers. The ITF was 'born on the picket line'⁶ and ever since that moment the delivery of practical actions for effective international solidarity has been the cornerstone of the Federation. In the 1920s and 1930s, the ITF opposed the proliferation of fascism and Nazism in Europe under the leadership of Dutch unionist Edo Fimmen. In the spring of 1920, Hungarian dictator, Admiral Horthy imprisoned and executed the regime's opponents including trade unionists in its 'white terror'. The ITF responded with the Hungarian and neighbouring unions. A trade boycott commenced on 20 June and effectively isolated the country. The regime was forced to negotiate with the ITF as the Hungarian ambassador in Vienna met with Fimmen in the presence of the Austrian president. The boycott was called off on 8 August where Horthy's government made some concessions. The atrocities in Hungary were exposed to the public (ITF, 1996a: 60–61). Later, the ITF was actively engaged in resistance movements in Germany. It was also assisting the Republicans in the Spanish civil war. The ITF shipped anti-fascism literatures with disguised covers. It produced leaflets against Mussolini and dropped them from the skies in Milan (ITF, 1996b: 4). Fimmen smuggled himself into German-occupied territories to hold anti-Nazi meetings. So did many others, some never to return. Seafarers from the neutral countries monitored the movement of U-boats and reported the activities to the liaison office that the ITF set-up in New York.

Despite these outstanding and unique examples of industrial and political activism, a period of decline or reticence followed repeatedly these climaxes in the history of the ITF. The employers reprisal immediately after the ITF was founded by blacklisting its activists, barring them from entering ports. This stalemate in its direct action tactics forced the ITF to relocate its headquarters to Hamburg in 1904. Under the new moderate German leadership, the membership surpassed

one million in ten years. Yet the outbreak of the First World War and the division in the workers' internationalism dissolved the Federation for several years. What V. I. Lenin wrote as 'the Collapse of Second International' was a real-life experience of the organisation. Then Edo Fimmen relaunched the Federation in 1919 and created the most effective international union movement to fight fascism between the two World Wars. Still it set itself away firmly to the 'free world' in the post-war period by producing the first and second general secretaries of the International Confederation of Free Trade Unions (ICFTU) from its leadership. In the later years of the Cold War, the long-established trade union rights were seriously attacked by the conservative forces which were gaining their momentum. 'Illegal' strikes by unions such as PATCO (Professional Air Traffic Controllers Organization) and the NUS (National Union of Seamen) were sanctioned so severely by the administrations of Ronald Reagan and Margaret Thatcher respectively that they have effectively destroyed these organisations. In 1986, the ITF analysed that the prevailing political and legal climate had made international solidarity considerably harder (ITF, 1986: 50).

Nevertheless, the Road Transport Workers' Section Conference in September 1996 made a conscious decision to turn its work more action-oriented. There were signs of changes from the analysis that the ITF made ten years ago and the Section was ready and eager to learn from these experiences. A large-scale French strike action in the winter of 1995 against the government plans to cut public expenditures was successful. In November 1996 truck drivers put a stranglehold on the French economy by taking control of the road transport infrastructure (Wahl, 1997). Against these backdrops the first International Action Day was designated on 9 June 1997.

Mobilising solidarity

In the following year, the ITF's 39th Congress⁷ unanimously adopted its policy document, 'Mobilising Solidarity' which stressed that 'solidarity – the collective trade union strength – has always been and remains the basis of the ITF'. 'The ability to take industrial action lies at the heart of trade unionism'. Without it, 'unions are reduced to being nothing more significant than the NGOs with worthy objectives and well-informed arguments. We should never forget that we are listened to not because we are right but because we are strong' (ITF, 1998: 4). It aimed to 'flatten the pyramid' of communications so that the interaction between the ITF and its affiliates might become multi-layered, directly involving a wider range of union officials and activists in international union activity (Transport International, 2002: 13–14). The ITF developed this concept of 'Mobilising Solidarity' through its experiences in key international disputes that it engaged itself heavily in. The French winter offensives were also inspirational. One example was the Patrick's dispute in 1998 involving the Maritime Union of Australia. The other was the UPS dispute. It was the biggest strike in the post-war history of North America led by the Teamsters Union (IBT) and its 185,000 workers. In both cases, international solidarity played a major role in influencing the course of the disputes.

The UPS strike

In 1996, the IBT was envisaging a difficult round of contract negotiations with UPS. Two-thirds of its workforce in America were part-timers and the union wanted to put an end to it. They mobilised the workers around the slogan 'Part-time America Doesn't Work'. The union adopted a tactic to put pressure on the UPS's overseas operation as the company had already made a huge investment in the European market. Teamsters reached out to those unions through the ITF. The ITF World Council of UPS Unions was established. Teamsters stressed to the American management that the UPS workers across the Atlantic are finding a common platform of solidarity. On one occasion, European unionists flew into join the Teamsters in their meeting with the management in Washington DC. When the national work stoppage started in the summer of 1997, a coordinator from the IBT was based in the ITF Headquarters and made contacts with the UPS World Council members. In response Belgian workers went on a wildcat strike. Where such stoppage was not possible, sympathy actions were organised by transport workers. Large UPS customers like Mercedes-Benz and Philips were urged to stop using UPS services during the strike by their unions (ITF, 2002: 43). In India, railway workers refused to deliver UPS packages. Operation in Manila was paralysed for a day as the local civil aviation union organised a motorcade to surround the company premises. Its headquarters in Atlanta were bombarded with protest messages from more than 50 countries worldwide (Russo and Banks, 1998: 16). Finally, the transport sector of the French CGT confederation announced on 18 August that they are ready to shut down the UPS operations at Orly Airport. Calls for a European-wide action were looming. On the following day, UPS ended the strike by conceding a favourable contract before simultaneous walkouts were to be staged by unions in Europe (Transport International, 2005: 21). Those directly involved in the negotiations felt that these actions were an important factor that precipitated the UPS settlement (Russo and Banks, 1998: 16).

The collapse of the Soviet Union and its Eastern Bloc accelerated capitalism's offensive against organised labour. Armed with their neo-liberal theory, this round of class struggle was provoked from their side. What happened to the British miners and the Japanese national railway workers in the 1980s were repeated in Australia (or in Liverpool) to attack and remove the bottleneck in the making of a new seamless transport system which would eventually find its name: the supply-chain. The Teamsters' slogan during the UPS dispute to challenge part-time work is what a larger number of unions around the world are echoing today in their campaigns against precarious work. In these difficult times, still the transport workers and their unionism held their ground. The ITF pulled together 'Mobilising Solidarity' from these disputes and the experiences it gained. In a historical period when the economy was truly becoming global, the ITF had its means and political will to turn its activism equally global.

The UPS strike and the role of the ITF showed how coordinated international solidarity actions can push back the pressure from employers or governments in a conflict. If that is the case, can the workers and their trade unions place themselves

on an offensive mode by identifying a common issue that brings them together? Concerted actions will be coordinated by the ITF. Rather than waiting for a dispute to happen and respond to it collectively, can the unions organise a worldwide day of action with a common workplace issues such as 'fatigue' or 'safety'? Activities will differ from one country to another. However, the ITF will maximise the visibility of unions in action and publicise the worldwide events comprehensively. Preparation will be thorough. This is how the lessons learnt from the UPS dispute were conceptualised and built into the Action Day campaign that started in 1997. The Secretariat also consciously promoted the campaign around the world as the majority of the original 13 countries that took part in the first year's events were from Europe. The same approach was taken when the railway workers launched their 'Safety First' campaign in 2000. This methodology remains to be the backbone of the annual events ever since. After four years, just prior to the next Congress in 2002, the ITF reviewed the Mobilising Solidarity programmes. Based on a survey where a third of all affiliates have replied, it noted 'a major shift in the focus of ITF activities away from meetings and towards global campaigns' where 'some of these campaigns have involved impressive international mass actions, including demonstrations, lobbies of national parliaments etc' and 'have usually brought many thousands of trade union members into direct involvement in an ITF activity for the first time'. It concluded that this was not the only change in ITF activities but now 'ITF meetings and activities have to deliver real benefits to union leaders' (Transport International, 2002: 13–14).

Global Action Day: doing the leg work

In practice, the making of an Action Day is simple and straightforward. The Section sets the date and theme of the event with the widest common denominator for the affiliates and invites them to participate. It is a decision taken in its Steering Committee or the Annual Meeting. What is an issue that brings the vast majority of the road transport workers and their unions to a common platform for collective action? 'Fatigue Kills' has been a very popular slogan because deregulation in the road transport industries has been a global phenomenon and substantially deteriorated the wages and working conditions of the workers irrespective of their nationalities over the past few decades. The date of the global events settled to the first half of October after a couple of initial years' trials in June and September. As a colleague from South Africa cites: 'the Action Day campaign has become part of a culture' because 'the activists are familiar with the timing of this annual campaign day' and they are 'ready to start thinking about the activities to organise on the day a month before the event' (ITF – Road Transport Workers' Section, 2007: 27). Since the Section encourages the unions to involve their rank and file members, these events cannot take place in the months of cold weather and therefore options are rather limited because the affiliates exist in both Hemispheres. The choice of mid-October is widely accepted by the unions although a religious fasting or a festival has overlapped with these dates in the past and raised some issues. Nevertheless, the Secretariat has stressed that all actions should take place

as closely as possible to the designated week when an affiliate notices a problem with the date. The sense of unity could only be generated amongst the unions if they can feel the collective strength through simultaneous activities. Actions cannot be scattered over a long duration.

Over the years, the Secretariat has gathered a catalogue of activities that the unions have taken during an Action Day. Many unions organise border delays through road blockades or 'go-slow convoys' as well as mobilisation of their members into demonstrations, marches, rallies, sit-ins (dharna) and even work stoppages in several cases. Others would organise leafleting; set-up information stands; hold a media briefing; organise seminars and conferences on road safety; work with the police to inspect vehicle safety or to display a wrecked vehicle in a public space. Some unions use the Action Day to lobby the government or inter-governmental bodies such as the European Union or ECOWAS and MERCOSUR. Unions have used the Action Day to pressure the management in their negotiations. Some will combine different types of actions. Whilst the ITF stresses that the campaign must uphold the same slogan and organise activities on the same date worldwide, it has always been flexible towards the types of the actions that the unions would choose. That is simply because the law and customs differ from a country to another. Nevertheless it has always requested the affiliates to involve the grass-root members and such call has been well-taken note of.

The participation to the Action Day has grown steadily since 1997. The following year saw the number almost trebling and it peaked in 2001 with the involvement of unions in 62 countries. Since 1999 on average, it enjoys the participation of unions from 54 countries. Each year sees new unions joining the Action Day. What boosted the level of participation was the planned and timetabled preparation of the campaign. It is pointless to send the campaign poster just a few weeks before the Action Day to the national offices of the affiliates because they would then have to distribute the poster to their regional offices and often to the branches from the regions. The campaign materials are sent out in late July or early August. That means that the design work would start in late spring. Because the preparation is not on a daily-basis, self-discipline in time keeping that spans for several months is very crucial. Months of June, July and August have often been allocated for education seminars and regional meetings to discuss the practical preparation of the Action Day with the affiliates. The Campaign Guidelines is distributed to the affiliates. There is a clear link between the number of unions joining the campaign and the number of meetings held in advance to promote this Action Day. In 1997, only one small preparatory meeting was held in London with the European affiliates. The number of countries that took actions was about a dozen and only three from non-European regions. In 1998, there were four sub-regional and regional seminars, 36 countries joined. Since then, the Secretariat has constantly held 6 to 11 such meetings annually and unions from 46 to 62 countries are part of the campaign. In these meetings the participants are asked to formulate the actual programme of the day and elaborate on it. In a group discussion, unionists from the neighbouring countries could further consider arrangements on cross-border action. As a run-up to this mid-October event, the Secretariat releases the

Worldwide Update to inform all the planned actions by the affiliates that they have gathered.

An ITF Action Day is more than 24 hours. When the colleagues in Oceania are kicking-off this global event, the US West Coast is still in their afternoon of the previous day. By the time the unionists in East Asia finish their activities, the European affiliates are just about to start their day. The ITF staff call-up the unions and ask how their programmes were implemented. Such information is summarised into Breaking News that is released electronically four to six times a day. 'The ITF rotates the globe with its provision of information'.⁸ More and more unions nowadays are submitting digital photos immediately after their actions, making the ITF report more visual. Mass media may take some notice of this global campaign but it is much confined as a national report if not in a local press. There is nobody anywhere who could provide an overview of all the actions worldwide except the ITF. That is why the Secretariat cross-feeds the information from the affiliates to provide a global perspective of the day. To keep its newsworthiness, such service must be available spontaneously. Nevertheless, any trade union campaign can only claim itself to be successful if it achieves results for the members concerned.

Achievements of the campaign

There are different levels of achievements that the ITF and its affiliates have gained through this Action Day campaign. First, there are concrete outcomes for the road transport workers' unions in some countries and regions.

New legislation

- Adoption of the Working Time Directive for mobile road transport workers by the European Parliament and the Council of Transport Ministers in February 2002.

The unions in Europe were confronted with serious opposition from the employers and felt strongly that an action-oriented campaign was necessary to push forward their demand. On 1 October 2000, a day prior to the meeting of the Transport Ministers, 1,000 activists gathered in Luxembourg where the meeting was scheduled and took border actions at nine locations simultaneously. This successful breakthrough has also set a precedent in the newly born European Transport Workers' Federation (ETF)⁹ to mobilise its members for actions in pursuing their issues, together with their lobbying efforts in the European institutions.

The ITF has also received the following reports from its affiliates:

- a new legislation in Bangladesh stipulating that two drivers must be on duty for shifts that exceed eight hours of driving time (1997);
- a legislation in Bulgaria which is in line with International Labour Organization (ILO) Convention 153 concerning hours of work and rest periods (1998);

- a legislation in Paraguay to cancel the operating licenses of companies that breach regulations (1998);
- conclusion of a tripartite agreement in Luxembourg to reduce the total shift duration to 11 hours in the bus sector (2002);
- a new legislation in Chile to reduce the retirement age for truck drivers (2002);
- a legislation in Thailand to limit the working hours of professional drivers to eight per day with rest time after four hours (2002).

Others have given the ITF their progress report in dealing with the improvement on rules and regulations for professional drivers:

- the union in Nepal wins the promise of the government to introduce a new law to regulate the road transport industry and improve accident insurance (1998);
- the ITF Francophone office addresses the border delay problems to the West African Economic Group, ECOWAS (2000);
- the Lithuanian government agrees to improve drivers' working conditions and border-crossing procedures (2001);
- the Labour Minister in Honduras publicly announces that the working hours of professional drivers will be regulated (2003);
- the union in Ethiopia wins the agreement of the employers and the Federal Transport Authority to resolve cross-border problems for long-distance drivers on Ethiopia – Djibouti corridor (2007).

There is only one ILO Convention for professional drivers,¹⁰ contrary to the long list of maritime conventions. Neither is there any permanent international body for road transport industry that is equivalent to the International Maritime Organisation (IMO) or International Civil Aviation Organisation (ICAO) where the workers' representative has a voice. The yardstick with which the ITF and its truck, bus and taxi workers' unions evaluate their success in this campaign must be considered in that context.

Negotiations with employers

Some ITF affiliates have used the Action Day and the global mobilisation of workers and unions to negotiate successfully their demands with management:

- the Honduran truck drivers' union wins an increased rest period for drivers working with an oil multinational corporation (1998);
- the transport union in Zimbabwe sets the deadline for negotiations with a large trucking firm on the Action Day and subsequently secures its demands for improved working conditions (2001);
- the Malaysian transport union commemorates the signing of the first memorandum of understanding on occupational health and safety with a major bus operator (2002);

- the tanker drivers of the oil and petrochemical workers' union reaches an agreement with the Jordan Refinery Company and renews health insurance and collective bargaining agreements (2004).

It maybe only some unions that would gain an outcome from the Action Day but nobody will achieve anything if the level of participation is low. Although some actions maybe small in scale, the collection of the efforts and its publicity by the ITF will create larger pressures on some governments and employers.

Influence on media and UN body

'We thought the truckers were our enemies. They took away our loved ones. But we soon learnt how long they are forced to work', said a representative of the US-based lobby group, Parents Against Tired Truckers (PATT) in their conference.¹¹ A perception is deeply rooted in our society that road accidents are caused by the wreck-less driving of the truckers. The ITF campaign has, however, had some effects in media:

- in the past accidents have been attributed to speed, but now thanks to the campaign, fatigue has also been incorporated as a possible cause (Uganda);
- the public erroneously believed that the truck drivers were responsible for a large number of road accidents – now they are seen differently thanks to our campaign (Italy) (ITF – Road Transport Workers' Section, 2007: 27).

In 2005, the ILO released a Working Paper titled 'The Issues of Fatigue and Working Time in the Road Transport Sector' in conjunction with the Action Day. This tripartite body and an agent of the United Nations concluded and emphasised in the document the 'need to limit excessive hours of work and irregular working hours' in order 'to protect the health and safety of road transport workers, and the public'. It endorses the ITF campaign with the following message:

- this Working Paper supports the ITF international campaign 'Fatigue Kills' (Beaulieu, 2005: 3).

Organising the unorganised

More recently, since 2005, the Section has adopted the new slogan, 'Organising Globally – Building Union Power' to stress the need of organising the unorganised workers. The highly popular message, 'Fatigue Kills' would remain as a campaign logo. This initiative was reflected in the 41st Congress of ITF in Durban in the following year as the highest governing body of the Federation adopted 'Organising Globally – Fighting for our Rights' as its main theme for the next four years. With this gradual shift in the focus of the campaign, more unions are now reporting their organising efforts where they use this campaign to approach new members:

- the Norwegian transport workers' union mobilised the majority of its branches in an organising campaign where the union registered more than 150 new members during the week. The same exercise has been repeated twice a year since then (2006);
- following a meeting during the Action Week with a large number of micro-bus drivers, these self-employed drivers became union members within the structure of the Mongolian transport union (2007);
- the Transport and Dockers' union in Mumbai recruited 140 workers after a week of events which culminated in a mass demonstration at the port gate (2007) (ITF – Road Transport Workers' Section, 2007: 25).

Many unions such as those from Switzerland, South Africa, New Zealand, Sweden, Germany and Canada have used the Action Day to approach unorganised workers from the outset of the campaign. The union in Chile has combined the Action Day campaign and the ITF's education activities effectively and increased their membership substantially over a period of time. Similar reports are received from Colombia and Paraguay. The CAW in Canada has reported regularly to the ITF its satisfaction with the Action Day:

- it has been a great learning and educational experience for our activists to take out their rank and file members as well as their community-based organisers and use the ITF's global message. They find it extremely helpful in approaching the workers (ITF – Road Transport Workers' Section, 2007: 28).

Mass mobilisation

An impressive feature of this campaign is the mobilisation of the rank and file members, often en masse, to rallies and demonstrations. Photographs from South Asian cities such as Dhaka, Bangalore, Kathmandu and Lahore show a powerful and colourful manifestation of the masses and decorated vehicles. Altogether, unions in some 70 countries have taken part in such action. Mobilisation has not been confined to these street actions. In 1999, more than 6,000 replies on the ITF Professional Drivers' Fatigue Survey were sent back from 19 countries. Never in the past had such a huge response come to an ITF questionnaire from the rank and file members.

Border actions

A unique activity of this campaign has been the joint border action. In 2007, road transport unions from Estonia, Latvia and Lithuania hit the Baltic borders at Grebnevo, Narva and Terechovo facing Russia, whilst their representatives met with the EU Commissioner Jacques Barrot as a part of the European delegation to discuss improvement in rest areas and reduction in waiting times at borders. Unions in West Africa have been meeting annually at border points such as Bitou, Torodi, Elubo/Noe, Paga, Gaya, Bamako and Zegoua. A long vehicle convoy follows the

rally and disperses the corrupt policemen and their private 'check-points'. These joint actions have given them strength and confidence to pressure the sub-regional economic group, ECOWAS and their governments on issues related to delays and corruption at borders. Likewise, South African unionists have met with their colleagues from Zimbabwe at Beitbridge or visited Swaziland in solidarity. Such gathering would include a session on HIV/AIDS as the delay at borders is one contributing factor in spreading this disease. A lesson on prevention is open to the local commercial sex workers. Unionists in Latin America and Central America have jointly visited border truck stops, too. These events often utilised an education seminar or a workshop in advance to plan the programme.

We are not alone

ITF affiliates confirm positive feedbacks on the Action Day from their ordinary members. In Spain, where the border action has become an annual event, it was the activists who wanted the continuation of such exercise against the union leadership who sought for a different programme.¹² There are those who enjoy their participation in an Action Day so much that they would ask their officials, 'when is it next year?' (Mather, 2008: 3). Some would take a great pride to be in charge of the organisation. It is a stark contrast to the lack of interest or scepticism that a union leader could face on international union work from their members. It shows the strong buy-in that this campaign has won from the grass-root members. They are willing to get involved and look forward to the next event because long working hours or lack of adequate rest facilities are their bread and butter issues. They find out through the ITF campaign that such issues are not confined to their workplace or the country that they live in. Deregulation and liberalisation have put the workers on the defensive as the attacks imposed have been unprecedented and many are struggling to survive. They have felt isolated and occlusive. But they learn that some unions are fighting back and are winning. That is how the Action Day gives them the strong sense of solidarity and unity:

- 'we are not alone on the Action Day and that is why our members do not hesitate to join the activities' (SINAMEQUIPH, Honduras);
- 'the actions have raised an interest for international questions amongst our union all over the country (Svenska Transportarbetareförbundet)' (ITF – Road Transport Workers' Section, 2007: 27).

In unions, everything starts from the workplace and ends there, including international trade unionism (Masuda, 1993: 24). Today, many activists and grass-root members see the ITF Action Day as part of their pertinent work.

An international conference with a list of speakers may just adopt conclusions that were drafted in advance. It could spend hours on country reports. Some delegates may ignore the timetable and only speak of their own interest. Poverty could be such an issue from the global South. Those from the North could just be interested in their own technical issue such as digital tachograph. In building-up the

Action Days, the Section has firmly drawn its line from these 'traditional' practices. Discussions will envisage the actual day which will come in a few months' time. The facilitator stresses that the ITF is not a charity organisation and how it is different from workers' solidarity (I was once challenged by a delegate from Zambia on that point. 'If so, then introduce me to a charity organisation' he said!). This point is not just relevant to the unions in the developing countries. Those from the industrialised nations may only feel sorry about the shocking poverty, but they fail to identify workers' issues that exist commonly irrespective of their regions. The attitude of the delegates changes substantially as they find out that this international federation is addressing pertinent issues at workplaces on a global basis. Not only are the commitments they make there then implemented in most cases, these unions from the global South also invest in materials for the Action Day. They print their own banners. Some design their campaign T-shirt. The level of self-reliance in financing an ITF Action Day is unprecedented and in many cases their manifestation is most impressive. The Section does not provide assistance to unions for the Action Day in principle.

The Action Day backed by the promotion of Mobilising Solidarity programme has pushed the Road Transport (and Railway) Workers Section to be more action-oriented and campaign-based in its activities. The Section meetings have become much less of a talking shop. These changes have been evident in the eyes of the affiliates. The vigorously sustained campaign and the speed of communication and feedbacks by the Secretariat show that the ITF has embarked on the campaign with considerable seriousness (Transport Workers' Union of Malaysia) (ITF – Road Transport Workers' Section, 2001: 1).

Despite these achievements of the campaign, one must always scrutinise its work and identify the shortcomings. For example, some may feel that the ITF is running this campaign just for the sake of continuity. Others may site that some key affiliates rarely take part in the Action Day. In theory, the ITF can halt this annual event if enough affiliates feel the campaign fatigue. But in reality, there will always be an affiliate or a group of unions that will call for a global day of protest over an issue. If so, why start from scratches when the Section has built its expertise? It will just have to be flexible enough to take on board new demands from unions. It also needs to share its experiences more widely with other Sections of the ITF and with members of the global unions. As long as the Secretariat does not neglect the 'leg work', it can take up new challenges. Perhaps a tailor-made event on a single issue for a smaller group of unions could be planned? This may bring on board those unions who are uninterested in a broad and general campaign. But the most fundamental question about this campaign is simply as follows. Has it progressed the political agenda that it inherited from its birth? It has successfully mobilised masses of workers into *industrial issues* such as drivers' fatigue (or rail safety) by focusing on the *effects* of privatisation and deregulation. What about then the *political* fight-back against the offense of capitalism or policies of neo-liberalism which is the root-cause of these issues?

Rank and file activism

The Fimmen Era illustrates the bravery and commitment of the ITF leadership and its activists to stand-up persistently against sovereign states when fundamental workers' rights are oppressed and the foundation of democratic society is under attack. Its spirit was inherited in the post-war period as the ITF joined the political struggle against Apartheid in South Africa. Today, we see independent workers' unions under attack in countries such as Iran. For several years, the Section has been instrumental in the campaign for Iranian workers and their basic rights as bus union leaders Mansour Osanloo and Ebrahim Madadi are jailed on trumped-up charges of 'jeopardising national security'. The ITF has led the Justice for Iranian Workers Campaign¹³ with unprecedented four International Action Days since 2006, calling for the freedom of these men and recognition of independent trade unions in Iran. This is an ITF-wide protest in collaboration with other international sister organisations such as the International Trade Union Confederation (ITUC), Education International and IUF.¹⁴ Amnesty International has been a key partner. Because the ITF's road transport and rail affiliates are well versed with the organisation of an Action Day, the transformation of an industrial campaign methodology into this political global action was almost seamless. Comradely support came from maritime unions including those ITF ship inspectors who visited Iranian vessels in protest. 'The ITF has tarnished the reputation of the country'.¹⁵ How could then this campaign be further developed politically? The historical action against the Hungarian fascist in 1920 would be a case worth studying. As this ITF-wide mobilisation was successful, how could it be developed on other initiatives?

In the meantime, railway workers' unions in Europe are firming-up their consensus against rail liberalisation. Organised by the ETF, 20,000 workers from 12 countries took to the streets of Paris in November 2009 under the slogan 'It's Enough'. How will the ITF support and promote this development? In October 2008, ITF unions and organisations of social movements met to discuss possible areas of cooperation and focused on casualisation of the workforce and the globalisation of production. The meeting concluded that they could work together to challenge neo-liberal policies if they were able to share information, accept their differences and ensure that all their expertise was used (ITF, 2008). How can the Action Day campaign follow-up such an initiative?

Whatever the shape or form this Action Day campaign will turn into, those who will organise the work 'must constantly criticise themselves, constantly interrupt themselves in their own course, return to the apparently accomplished, in order to begin anew' (Marxists Internet Archive, 1990) so that they will not repeat themselves into the same pattern of the ITF history, where the activism that it built was followed by decline. There is one significant difference from the times of those landmarks in the past, though. The international labour activism is now well rooted with the activists and rank and file. Hundreds and thousands of these men and women will remain nameless unlike the founding fathers or 'the colossus of the interwar period' (ITF, 1996b: 6–7) and those who followed them. Yet the ITF will be strong, if not stronger. By flattening down the pyramid, it gained its

access to generate global union power from below. This is the new dynamics that the Action Day campaign has added to the history of the ITF.

Disclaimer

The views expressed here are the author's own and do not necessarily reflect the policies of the International Transport Workers' Federation (ITF).

Notes

- 1 ITF brings together 654 transport workers' unions globally (November 2009). It is one of 12 Global Union Federations (GUFs) allied with the ITUC, who is the successor of the ICFTU. It is based in London with its eight Industrial Sections and departments. Historically, it was located in Hamburg, Berlin and Amsterdam. Today, the ITF has regional offices in Nairobi, Ouagadougou, Tokyo, New Delhi, Rio de Janeiro, Amman, Moscow and Brussels. Visit <http://www.itfglobal.org> for more details.
- 2 The total registered membership of the ITF is 4.5 million in 148 countries (November 2009). The actual workers in the road transport industry are much higher. The Section is 30 per cent of the ITF membership.
- 3 Other Action Day Campaigns since 1997 include 'Air Rage (2000)', 'Safety and Security (2004)', 'Justice at TNT (2006)' and many more.
- 4 The Section moved on to organising an Action Week since 2005 but 'Action Day' is used throughout the text to cover both types of events.
- 5 This was the fourth Congress of the Second International.
- 6 A remark by J. K. Katende at the ITF African Regional Conference, Nairobi, 13–19 September 1998.
- 7 New Delhi, 29 October–5 November 2008.
- 8 A remark by O. Yomono at the Section Conference, Berlin, 22–24 June 2004.
- 9 Founded in 1999, ETF is the region body of the ITF and the transport federation of the European Trade Union Confederation.
- 10 ILO Convention 153 deals exclusively with conditions in road transport and covers hours of work and rest periods. Adopted in 1979, it has been ratified by Ecuador, Iraq, Mexico, Spain, Switzerland, Turkey, Uruguay and Venezuela.
- 11 *Concrete Solutions for Reducing Truck Driver Fatigue – The First Annual Conference of Parents Against Tired Truckers*, San Diego, 26–27 February 1999.
- 12 A remark by J. L. Garcias at the Section Steering Committee meeting, Brussels, 12–13 March 2008.
- 13 See <http://www.freeosanloo.org> and <http://www.justiceforiranianworkers.org>.
- 14 International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations.
- 15 A remark by A. H. Shahmir in an informal meeting on 24 October 2006 in Geneva.

Part III

Transnational solidarity involving trade unions and social movements

6 Informal work and transnational organising

*Ilda Lindell*¹

Expanding informality and transnational organising

Economic informality² in various and shifting forms is becoming global in scope in the context of processes of globalisation (see Chapter 1). Casualisation of work has become pronounced in many places, often in connection with corporate strategies of ‘flexible production’ (Castells and Portes, 1989; Cross and Morales, 2007). In countries of the Global South, the spread of neo-liberal policies has often resulted in a decline in formal work opportunities and large-scale retrenchments, both of which have pushed large numbers of people into self-employment in the informal economy (Hansen and Vaa, 2004; Bryceson, 2006). Increasingly exposed to the whims of international markets, large numbers of people making a living in the informal economy are experiencing a decline in incomes and conditions (Lourenço-Lindell, 2002). Many governments in the South have failed to put in place laws and policies to protect the basic rights of informal workers and to create opportunities for their political participation (Lindell, 2008a). Furthermore, many authorities continue to deny legal recognition to vulnerable groups in the informal economy and to criminalise their activities. Often portraying them as outlaws, public authorities in many places make use of harassment, raids and evictions to ‘discipline’ them, thus posing a tangible threat to their livelihoods (Brown, 2006; Lindell and Kamete, forthcoming).

Both global and local forces and actors are thus involved in shaping conditions in local informal economies (Lourenço-Lindell, 2002). However, disadvantaged groups in the informal economy are not necessarily passive in the face of these challenges, as this chapter and other works document (Horn, 2002; Gallin, 2004). In the face of these multiple pressures, informal workers increasingly organise collectively and establish transnational activist networks (Lindell, 2010a, 2010b). This contemporary international organising unsettles a deep-seated understanding that the agency of people in the informal economy is necessarily confined to the local level. This chapter discusses the significance of such transnational organising by analysing the internationalisation of an association of informal workers based in Maputo, Mozambique, and the political implications with respect to the local struggles in which informal workers are enmeshed.

The next section of the chapter presents different conceptions of the spatialities of resistance. This is followed by the empirical illustration that focuses on the

multi-scalar practices of the studied association, its local struggles and international connections. The chapter concludes by discussing the implications of the empirical findings for our understanding of the spatialities of resistance, and by reflecting upon the uncertainty of the political outcomes of transnational practices, as well as upon the political implications of a differentiated ability among social actors to establish transnational connections.

‘Glocal’ movements: beyond local vs. transnational resistance

In the current literature on resistance and agency two broad and diverging perspectives on the spatialities of resistance can be identified, where analyses tend to focus either on local resistance or on transnational mobilisations. The first one can be seen as a reaction to the dominant discourse of globalisation and its erasure of place. It consists of a general perspective that asserts place-based resistance to globalisation as a viable political project (Dirlik, 2001; Escobar, 2001; Gibson-Graham, 2002, 2008; Harcourt and Escobar, 2005). The key aim in this literature is to bring forward the agency of the local, by positing it as a key or primary site for the creation of alternative practices and identities that run counter to the globalisation project and discourse. Authors emphasise the cultivation of ‘local subjects’ and local alternative ways of being and doing. The politics being advocated often relies on a ‘defence of place’ or on the support of ‘community economies’, understood as ‘economic spaces or networks in which relations of interdependence are democratically negotiated’ (Gibson-Graham, 2008: 15). Such a stance has attracted criticism on various grounds. Massey (2004) points out that, in some of this work, the global is portrayed as being the ‘outside’ of place, and thus the local embeddedness of globalisation is neglected. All ills tend to be blamed on external forces and place/the local is portrayed as good and progressive, as an unproblematic collectivity, where intra-local contradictions are played down. In addition, a share of this work neglects the potential of transnational organising.

A contrasting set of perspectives stress transnational spatialities of resistance. The spatial disjuncture between economic and political processes that has been identified in the globalisation literature has led many writers to abandon notions of bounded political spaces and territories (such as the nation-state or the ‘local’), and to advocate perspectives that focus instead on transnational networked forms of politics (see Low, 1997; Featherstone, 2003; Featherstone *et al.*, 2007; Amin, 2002, 2004; for a discussion, see also Bulkeley, 2005 and Cumbers *et al.*, 2008). Such perspectives have generated a broad and varied body of work on transnational social movements and advocacy networks and on an emerging ‘global civil society’. Many of these analyses stress the formation of transnational consciousness and identities, often set in opposition to neo-liberal globalisation (see Cox, 2005; Falk, 2005; Gill, 2005). A share of this work portrays grassroots globalisation networks as de-territorialised, as constituting ‘non-places’ of resistance (see Hardt and Negri, 2001, 2004). Concomitantly, the local tends to be dismissed as politically irrelevant and locally based resistance is sometimes even seen as subservient to

the interests of capitalist 'empire', and thus as potentially regressive and reactionary (see Hardt and Negri, 2001). All agency, some critics have noted, seems to lie beyond the local level (Gibson-Graham, 2002).

Indeed, many analyses of resistance in the 'global age' tend to advocate one particular scale as appropriate and sufficient for understanding resistance and agency, by prioritising either place-based modes of consciousness or the rise of global movements. In some of this work, this involves counterpoising the local and the global, attributing to them different meanings and capabilities – for example by associating resistance with a particular scale (Purcell, 2006: 1928) or by opposing transnational movements and local resistance. These views are clearly insufficient to grasp multi-scalar instances of popular mobilisations such as the one analysed in this chapter. Alternatively, one may look upon the local and the global as mutually constituted scales of action, which opens the possibility of a politics that *combines* resistance at multiple scales.

Particularly worrying is the sharp division between interpretations of the spatialities of resistance as either non-territorial or place-based. Some writers emphasise that global resistance networks connect various place-based movements that, while not place-bound, remain deeply territorialised and embedded in particular places – in their histories, cultures, and so forth (see Escobar, 2001; Routledge, 2000, 2003; Harcourt and Escobar, 2005; Cumbers *et al.*, 2008; Dirlik, 2001; Featherstone, 2003). According to Escobar, the strategies of social movements for defending local cultures and practices may include an engagement with transnational networks, that is, 'glocal strategies through meshworks that enable social movements to engage in the production of locality' (2001: 161). The complex relations and interactions that shape identities today, he argues, might involve uprootedness and mobility as well as 'attachment to place'. A consideration of how transnational networks may relate to local power relations is however less common. In this context, it is useful to evoke notions of 'place' that take account of both power relations within place and relations constructed on a wider scale – as proposed by Massey (2004, 2007) and Amin (2004). Such work attempts to integrate the local and the global and stresses the importance of interactions at a variety of scales and the consequent blurring of the boundary between the 'inside' and the 'outside' of place. It takes account of the multiplying connections between local and distant actors, which are part of the politics of place. Such an approach is thus useful for the analysis of the relationship between transnational organising and local struggles, pursued in this chapter.

The empirical part of this chapter discusses the internationalisation of an association of informal workers and its political implications. It illustrates how the association organises across scales – what I refer to as 'glocal' movements – thus pointing to the importance of a multi-scalar analysis of popular action. This is of relevance not least in relation to the agency of informal workers, usually seen as confined to the local level. The case explores how global and local scales of social action interact with each other. More precisely, the chapter argues that the transnational activities and networks of the studied group are closely connected to the politics of the particular place in which the group is enmeshed, and are

thus territorialised. But the argument is not about the importance of transnational movements for the 'defence of place' – in the sense of a supposedly homogeneous collectivity unified against an external threat. Rather, the chapter argues that transnational organising may assist popular groups in challenging local dominant actors and their place projects. The analysis is based on a field study of a vendors' association in Maputo, Mozambique, and of its international linkages. This association was the largest of its kind in Maputo, with representation in a large number of city markets. It was also selected because of its role as a political actor on the local scene and because of its international linkages, features which both illustrate wider and novel trends in what concerns the collective agency of informal workers in the African context. Some 23 persons in various levels of leadership in the association were interviewed – including both members of the executive committee and of the market committees established in a number of city markets. Interviews were conducted with about 25 vendors operating in some ten market places in both central and peripheral parts of the city. The views of a couple of government officials and politicians were recorded, although several declined to be interviewed on a topic as politically sensitive as the urban informal economy. Interviews were also carried out with a couple of senior trade unions officials and with some of the international partners of the association. The latter included the coordinator of the international network of which the association is a member, as well as representatives of a South African organisation also affiliated to the network and with which the Mozambican association had undertaken exchange visits. In addition, interviews with leading persons in membership-based organisations representing informal workers in a number of other African countries have made it possible to set the case study material in a wider context.

Informalisation and organising in Maputo: battles over place

Like many other urban centres in Africa, Maputo, the capital of Mozambique, has been experiencing extensive informalisation of livelihoods. Informal vending activities have become the source of income for large numbers of urbanites and a great variety of groups, including retrenched public sector and industrial workers, rural migrants and demobilised soldiers (Lachartre, 2000; Lundin, 2001). Real incomes have declined for many vendors in the face of growing competition and the worsening purchasing power of the urban population. As vendors increase in number, they occupy idle land and/or build unplanned markets, which have multiplied throughout the city. The majority of urban vendors cannot count on state provision of infrastructure and services. Many operate in deplorable conditions, without shade or from pavements that turn into mud during the rainy season. These conditions pose serious health risks for them, their infants (whom they often have to bring to the market) and their clients. In addition to these difficulties, agents of local government frequently harass and use violence against these vendors. This is a source of great insecurity among the vendors, as it depletes their incomes and deprives them of the right to a livelihood.

In the face of the hostility of the city authorities, a vendors' association was

created in Maputo in 1999, with the name Association of Workers and Operators of the Informal Sector (Associação dos Operadores e Trabalhadores do Sector Informal, ASSOTSI). The initial impetus came from one of the two national trade union federations in the country, the Organisation of Mozambican Workers (Organização do Trabalhador Mozambicano, OTM). As a top executive in the federation expressed it in an interview, many former wage workers and union members were now earning a living by selling in the streets and markets of the capital and were being chased and harassed on a frequent basis – in her view, the union had an obligation to reach out to these workers. The federation leaders thus called a number of vendors from the city markets to a meeting, to urge them to create their own association, and promised to support it. The association was founded, with its own internal decision structures, statutes and membership. While preserving a degree of autonomy, it became a fully affiliated member of the trade union federation.³ In this way, it was granted the same rights and duties as a regular affiliated wage worker union. According to its leaders, the association has been able to count with the support of the federation in critical moments of its struggle with the intolerant local authorities. Formal and informal workers may have different and conflicting interests, and solidarity between such different constituencies is far from self-evident (Chapter 1 by Bieler and Lindberg; Lindell, 2010c). In this case, however, differences appear to have been bridged and common ground constructed (see Lindell, 2008b, 2010c).

The internal structure of the association partly resembles that of a traditional trade union, which is not uncommon among informal workers' organisations (Chapter 1 by Bieler and Lindberg). It comprises an executive committee that supervises and coordinates activities and market committees in a number of affiliated markets. The association also encompasses a women's desk, that is an extension of a similar structure within the union federation and that consists of a city level coordinator and committees at the market place level. The executive committee, the market committees and women's committees are chosen by elections. Many leadership positions in the association are occupied by men, while the constituency of the association is largely composed of female vendors. The market committees carry out several important functions in the markets, as reported by members of these committees in several markets. In the face of deplorable working conditions, they provide basic infrastructure (water, toilets, etc.), make physical improvements (build shades, etc.), carry out maintenance work and organise security services and cleaning. These activities are financed from the fees that the committees collect from the vendors in their respective markets. Each market committee administers its revenues autonomously and has its own bank account. The committees are not the sole holders of authority in the markets – there are also agents of the municipal government operating in the markets (fee collectors and sometimes municipal police), and in some cases there is a local office of the ruling party. But it is the market committees that in practice manage the markets and set the rules of conduct to be followed. As the interviewed committee leaders explained, among other things, the committees control access to stalls in the markets. Market committees often have considerable powers of punishment and

solve conflicts of various kinds in the market place – such as labour conflicts when informal work contracts are breached.

The internal relations within the association have not been trouble-free, as the interviews with both leaders and members uncovered. Limited opportunities for participation by regular vendors in plans and decisions made at the leadership level, struggles for leadership positions and occasional failures to consult with and defend vendors in critical situations in a timely fashion have sometimes generated contestation and rebellion by dissatisfied vendors or market committees, but have also in some cases led to negotiations and concessions by the leadership (Lindell, 2008a). In spite of these internal tensions, the association is the only force in the city that strives to defend vendors' rights to urban space. Indeed, interviewed vendors generally seemed to value the association highly in this respect. What seems to be at stake is the right to earn a living in the city and the recognition of these activities as legitimate. This is a battle that is fought primarily against the local government. As mentioned above, local government actors tend to have a negative attitude towards informal vendors in the city. Informal vending activities do not fit in well with the image of a modern and orderly city that local authorities seem to espouse. As space for such activities is not considered in urban plans, unplanned markets officially have a provisional status and are frequently threatened with eviction by the local authorities. Interviewed vendors operating in the streets and in unplanned markets often complained about harassment and physical violence by government agents. The latter include the municipal police and agents from sub-local administrative units, the Urban Districts. In the perception of interviewed vendors, the intention of the municipal council is to restrict their activities as much as possible.

The association strives for an image of legality by encouraging vendors to pay the fees to the municipal council – which the association leaders refer to as an 'occupation fee'. In turn, the leaders explained, the association expects the council to tolerate vending activities in the occupied spaces. However, the municipal council persists in harassing vendors in many areas and continues to threaten occupiers of unplanned market places with eviction. The council, through its practices, displays reluctance to accept the legal status of the association. According to the association leaders, the council blames the association for the low revenues that municipal fee collectors deliver to the council, since the market committees collect their own fees in the markets. There seems to exist a permanent tension about *who* is entitled to charge fees in the markets. This has occasionally led to acts of violence towards association representatives, who have been beaten up and thrown in jail. Market committees and municipal agents operating in the same market often distrust each other, or at best tolerate each other. In the view of several market committee leaders, municipal agents enjoy little legitimacy among the vendors. Many interviewed vendors stated that municipal agents collect the fees but give nothing back. The municipal council attempts to undermine and disrupt the work of the association in various ways (Lindell, 2008a). Local state agents have several times intervened in conflicts in the markets and within the association, which often resulted in their escalation. There have also been occasions when municipal officials have added fuel to the antagonisms between rival vendors' associations. Frequently, the city

council seems to create crises, thereby distracting the leadership of the association, which has to devote much time to attending to these crises. Association leaders complained that this drained the time and energy that they needed for mobilisation work and for attending to the needs of existing members. The relations between state actors and the association are, however, not exclusively antagonistic. Beneath the surface, there are exchanges between the association leaders and agents of the state, from which both parties expect to derive benefit (Lindell, 2008a).

In sum, the association strives to defend urban vendors from the hostility of municipal agents, to secure recognition of vendors as legitimate workers as well as for the legal recognition of unplanned markets. At times, the association has been able to devise concerted strategies and actions, made possible by its city-wide structure. This, in spite of conflicts within the association, has promoted solidarity between vendors in different markets, solidarity that has been visible in situations where an affiliated market comes under the threat of eviction. In this way, a wide and united front is mobilised, which the local government cannot ignore. Thus, by constituting an organised mass of people and by pursuing a common political project, the association has become an actor in urban politics in Maputo.

Transnational organising for local influence

Associations of informal workers in the South are increasingly establishing international links and creating international movements (Lindell, 2010b, 2010c). The studied association is a member of an international network of associations and unions of street and market vendors, StreetNet International. The network grew out of the realisation of the insufficiency of organising at the local level and of the need to work internationally, as explained by the coordinator of the network, interviewed in South Africa in 2004. Its launch in the early 2000s was preceded by a series of international meetings and workshops that gathered people from a variety of cities and countries in different regions of the world. Views and inputs were garnered at these events that would steer the drafting of the constitution of the organisation and its policy on a number of issues. The network is composed of membership-based groups that organise street and market vendors. Its affiliates include a range of groups, such as women's groups and mixed groups, trade unions that organise informal vendors and national alliances of organisations.

Being a member of the network, the association engages in frequent international exchanges. First, as explained by its coordinator, StreetNet facilitates exchanges between affiliated groups in different countries in order to make it possible for organisations to learn from each other. In this context, leaders of ASSOTSI reported to have had the opportunity to visit similar organisations and their markets in neighbouring countries. Leading persons in the global network and another member organisation have also visited the association and its affiliated markets in Maputo. Second, StreetNet organises international meetings and workshops that gather representatives of its member organisations. Representatives of ASSOTSI have participated in several of these meetings, both in Africa and beyond, and have travelled as far as India and South Korea to attend them. Several of those

who had had the opportunity to travel were interviewed. They expressed their high appreciation of such experiences. At such meetings, they explained, they meet a great variety of organisations representing people working in conditions that do not differ much from their own and who face similar problems – including harassment, lack of recognition and so on. At these meetings, they also have the opportunity to compare their strategies with those of other participant groups, about how to tackle these challenges as well as to debate a variety of issues related to informal work.

This international engagement appears to play a role in the local struggles of ASSOTSI and in its relations with the municipal council. Exchanges visits with other organisations of street vendors abroad, for example, seem to be a source of leverage for the association. Interviewed individuals who had participated in such visits expressed that, by visiting associations in other countries, they were able to envisage a different future for the vendors and an alternative vision for their city. This is illustrated by a visit paid by an ASSOTSI delegation to a sister organisation in Durban, South Africa. Interviewed members of the delegation reported how this visit made a strong impression on them. They referred to the developmental attitude of the Durban authorities towards informal vendors at that time, an attitude that differed from the repressive one that they were used to. ‘In South Africa we entered a market by escalator!’, one of the interviewees exclaimed, expressing how surprised he was to see the quality of the facilities provided by the authorities for the vendors in Durban. They noted the different nature of the relations that existed between local government and the Durban-based association, not least the respect and recognition the latter enjoyed. According to one of the interviewees, upon returning from that visit the ASSOTSI delegation went to ‘elucidate’ Maputo municipal officials about these differences, in order to encourage them to change their attitudes. It is as if, through such visits, those who travel acquire a clearer vision of what they want to strive for and learn that it is not an impossibility. The interviews revealed that they use this international experience to present the local government with concrete proposals and to demand change, by making use of their recently acquired knowledge of how things are done in other countries. In so doing, they actively contest the modernist vision of the Maputo authorities for the capital city and propose the construction of an alternative urban environment that allows for the inclusion of informal vendors and their activities.

Exchange visits have put pressure on the city council in yet another way. A delegation of the Durban-based association, interviewed in Durban in 2004, later visited ASSOTSI and its markets in Maputo. Some of the interviewed vendors mentioned the confident and outspoken way in which the South Africans spoke to the local media. During their visit, the Durban delegation also joined ASSOTSI representatives in a meeting with the municipal council. The visitors took the opportunity to exert pressure on the city officials. They told municipal officials in Maputo that they should create facilities for the informal vendors since local government derives considerable revenue from them. According to both ASSOTSI leaders and interviewed representatives of the South African association, this foreign ‘reinforcement’ made a strong impression on municipal officials and made them more willing to negotiate – at least temporarily. In this way, municipal agents

potentially become aware that their practices are made known abroad. These experiences of international exchange thus seem to be of importance for the relations between the association and the local government. This situation is, however, not unique to this particular association. The interviewed coordinator of StreetNet affirms that international engagement has shown itself to be important for all affiliates of the network in their local battles. In her words, (local) 'governments have not been accustomed to taking street vendors seriously. They treat them like people who are uneducated and unreliable and so on. But the minute they come there with some knowledge about what is happening in India or in Mozambique, or in South Africa . . . then everybody gets very impressed and it makes a major difference'. The global network itself has a policy of assisting member groups in their local struggles. This perception is confirmed by the interviewed representatives of associations and unions of informal workers in Zimbabwe, Zambia, Malawi, Kenya and Uganda. In situations of acute crisis, often triggered by government actors' actions, these groups are now able to mobilise considerable international solidarity through their international connections. In some situations, the interviewees considered that international support made some difference in tempering the aggressiveness of their governments. As one union leader put it, 'When we have problems, the government knows that we have friends out there'. In other words, governments realise that they are not dealing with isolated groups, but with groups that are backed by an international movement. More generally, it appears that there have been qualitative changes in the last few years in terms of the ability of African informal workers to mobilise support across borders (Lindell, 2010a, 2010b). These changes may have political effects.

The impact of this international solidarity on local relations with governments may appear to be less than tangible or to provide only temporary relief in situations of crisis, particularly in authoritarian political contexts. However, international exchanges also seem to provide those involved with a widened consciousness, a sense that they are part of a larger force. As several of the above association and union leaders explained, one gains strength from getting to know others elsewhere who are facing similar troubles. 'International organising', one stated, 'broadens your thinking'. It appears to facilitate a process of 're-subjectivation', to borrow Gibson-Graham's term (2002), by which these actors no longer see themselves as simply victims or as doomed to political and economic marginalisation. They are using a new discourse in which they refer to themselves and their constituencies as 'workers' and in which ideas of recognition and representation are central (Lindell, 2010b). They are asserting themselves as being the backbone of national economies as well as a major source of local government revenues. In this way, they are contesting elitist images of informal income earners as a nuisance, a disorderly crowd that can be blamed at random for a variety of evils. What also becomes evident from the empirical material is that, these associations and unions of informal workers appear to use their international connections primarily to exercise an oppositional politics in relation to their local and national governments. In this way, the global forces that influence the livelihood conditions of their constituencies tend to fade from sight. Last but not least, willingness as well

as opportunities to engage internationally may vary within associations. In the case of the studied association, it was possible to detect occasional internal resistance to such international engagement. A few of the respondents expressed scepticism about the international travelling of association leaders, and considered that it consumed the scarce revenues of the association without generating new resources. In the face of urgent local problems, this 'international tourism' as one called it, seemed to be unjustified. Within the association, opportunities to participate in international activities are not equally distributed and initially women were sometimes at a disadvantage.

'Glocal movements' and their political implications

This chapter set out to investigate the transnational practices of an association of informal workers and the political significance of such practices. In particular, the chapter attempts to illustrate how this transnational engagement is closely related to and embedded in struggles over place. In the studied case, participation in an international network assists the group in contesting the oppressive practices of the local authorities and in challenging the place 'project' of the local government – that of a modern, sanitised city, where unplanned marketplaces do not belong. This international engagement thus seems, in this case, to play a role in local politics. International exchanges with other groups have created awareness within the association that there are large numbers of distant others with whom they share similar problems. Such international experience is shaping their identities and discourses but also improving their bargaining abilities at the local level. Association members have become exposed to alternative ways of dealing with those problems and, by learning about progress achieved in other places, they are able to envisage a different future and to articulate alternative visions for their city. In this way, through its networking across scales, the group actively engages in the construction and production of place. The local government, in turn, has become aware that its actions are made known beyond national borders and has even occasionally been directly confronted by international allies of the local association.

These findings are of significance in several ways. By considering and integrating the multi-scalar practices of the studied group, the argument runs counter to a tendency in the literature to focus on either transnational movements or on place-based resistance as the sufficient and adequate scale of analysis, sometimes even opposing one to the other (see for example Low, 1997; Hardt and Negri, 2001, 2004; Gibson-Graham, 2002). The chapter shows that concentrating solely on one scale of analysis is insufficient to grasp instances of multi-scalar social action and renders invisible the ways in which multiple scales of organising are mutually constituted and entangled. In the studied case, this entanglement is illustrated by the fact that, transnational organising is intimately connected to the contestation of local power relations and hegemonic place projects. This challenges influential notions of transnational networks as necessarily de-territorialised, as if detached from 'the messy intricacies of the politics of particular places' (Bulkeley, 2005: 896). However, while insisting that such networks are territorialised, this article

differs from perspectives that depict that territorialisation in terms of a 'defence of place' – of local cultures, practises and identities – from external global forces. Rather, this chapter argues that transnational organising may be closely related to social struggles *within* place and shows how, in the studied case, it has been primarily aimed at challenging local dominant actors. This means that, for the time being, the studied association is not explicitly fighting powerful global institutions or neo-liberal globalisation. This is not to say that the informal workers described in this chapter are not exposed to global forces – which was acknowledged in the introduction to this chapter. However, it does suggest that there is no mechanical correspondence between spatialities of oppression and spatialities of resistance. Spatialities of resistance are contingent upon social practices, themselves variable in their geographical reach and temporality. Not fixed or permanent, the future spatial configurations of the described resistance practices are difficult to predict. They may change over time, as may their targets and their political outcomes. For example, there is no guarantee that the cross-scalar practices of the studied informal workers will not recede, rather than expand, or that the targets of their actions will always be local hegemonic actors. Indeed, there is no fixed relation between any activism at a particular scale and particular goals or outcomes (Purcell, 2006: 1929). There is no reason to assume that transnational organising will always result in particular political effects at the local level – or at whatever scale.

It is thus important to interrogate the complex and contingent spatialities of resistance, rather than taking them for granted (for example by ascribing resistance to one scale or another). This includes a consideration of the *where* and the *when* of transnational activism (Featherstone *et al.*, 2007: 389). Opportunities for connecting beyond the local level are certainly not equally distributed. Only a limited number of individuals within the studied association have been able to participate in international activities, which raises issues of access and representation. Different interests and groups within a given place can also be expected to differ in their ability to establish transnational connections – even among popular groups. One wonders what the political effects are of this varying ability. In other words, what are the consequences of some groups being able to secure international support and others remaining isolated? For example, are local divisions being reinforced and does participation in international networks provide a means through which participant groups achieve some comparative advantage in relation to other actors in the local/national scene? To be sure, places too, are differently endowed with connections to wider social movements – as much as they are differently located in the global networks of economic and political power. For example, in Africa, participation in international grassroots networks might be the privilege of groups in large capital cities. An internationalising civil society, rather than constituting a homogenising 'globalisation from below', has its own centres and peripheries. Such variations might be empowering/disempowering for different places and groups within them. Informal workers are among those groups who face many constraints to their geographical mobility. While it is important to acknowledge these constraints, it is also imperative to recognise the contemporary attempts by these actors to transcend those constraints. Their agency can no longer be seen

as simply confined to the local level. It is thus critical to explore the struggles through which they attempt to transgress borders and the political effects of when they succeed.

Notes

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- 1 The author wishes to thank the Swedish Research Council for financial support. She is also grateful to the leaders and members of ASSOTSI and to the international coordinator of StreetNet International.
- 2 Among various existing understandings of economic ‘informality’, a useful one is the rights-centred definition adopted by the International Labour Organization (ILO) in 2002 and largely embraced by activist networks (ILO, 2002a, 2002b; WIEGO, 2002). This definition generally considers as informal *any* type of work that is ‘not recognized or protected under the legal and regulatory frameworks’ and that therefore suffers from ‘decent work deficits’ (ILO, 2002a: 3).
- 3 Full affiliation of organisations of informal workers to trade unions is still a rare occurrence, in the evolving relationships between the two. See for a review of such relations in Africa, Lindell (2008b).

7 What does transnational labour organising and solidarity mean for Sri Lankan free trade zone women workers?

Samanthi J. Gunawardana

Free trade zones (FTZ) are an important site of study as the material locus of transnational production relations and as sites of worker resistance and organisation. Their establishment is associated with trade liberalisation and the introduction of export-led economic development models in Latin America, Asia and Africa which rely on foreign investment. Also known as special economic zones, export processing zones, or maquiladoras, FTZs are state demarcated production spaces where inputs are transformed into exportable goods. They operate under preferential investment policies, financial inducements, legal and political policies. FTZs are deeply embedded within the supply chain of multinational corporations, and conversely, are often the nodes that connect these corporations to local informal economies through the firm's sourcing practices. In 2007, the International Labour Organization (ILO) calculated that there were more than 2,700 FTZs across 130 countries, employing 63,118,236 people worldwide. The most number of people were employed in Asia, with Chinese workers making up 63 per cent of the total FTZ workforce. In most regions, more than 50 per cent of the workers are women (Boyenge, 2007).¹ FTZ employers tend to favour trade union substitution to generate greater flexibility for investors. Organising of FTZ workers occurs by local and global actors including women's groups, worker's centres, non-government organisations (NGOs), religious organisations, students, consumers and trade unions both independently and in alliance with one another (Tirado, 1994; Bickham Mendez, 2005; McKay, 2006).

In this chapter, I examine two modes of transnational solidarity centred on the rights and working conditions of Sri Lanka's FTZ apparel sector workers. The first involved a 'bottom-up' approach to transnational labour solidarity, where the key player was a local trade union, the Free Trade Zone and General Workers' Union (FTZGWU), which relied on a local NGO partnership and an international network of trade unions and NGOs for solidarity support. Action was designed to overcome employer resistance to the formation of a branch union. The second was a 'top-down' effort where the key actor was a Transnational Advocacy Network (TAN) (Keck and Sikkink, 1998), Oxfam, which facilitated the formation of a local coalition of NGOs and trade unions. Their aim was to examine the potential

effects of the phase out of the Multi-Fibre Agreement (MFA) in 2005 and to unite local advocacy efforts. The two campaigns sought recourse to a number of different governance mechanisms to uphold labour standards, including national level legislation, human rights clauses in trade agreements and voluntary corporate codes of conduct.

In highlighting the differences and similarities in how worker grievances were articulated and how solidarity was mobilised, interpreted and enacted within these two campaigns, I question what transnational solidarity has meant for the women workers who were the intended beneficiaries. In the complex global field of unequal trading arrangements and power inequality between capital and labour along global supply chains, transnational organisation and solidarity presents a viable tool for workers (Bronfenbrenner, 2007; Bieler *et al.*, 2008a; Gordon and Turner, 2000; Brooks, 2007). However, the multiplicity of actors involved in transnational campaigns, their unequal distribution of power and resources and the multi-scalar nature of transnational advocacy and solidarity means that we need to question whether the campaigns and their outcomes reflect the agency of women workers and worker's own sense of justice (Kabeer, 2004). How are workers incorporated into transnational campaigns and based on this incorporation, what conclusions can be drawn about the impact of transnational solidarity in women worker's lives?

While both the top-down and bottom-up approaches have their own strengths and weaknesses, the top-down approach to advocacy does not adequately harness women's agency. FTZ employment systems have been characterised as coercive, and workers presented as a monolithic group of 'oppressed third world women' drawn into the forces of global capitalist production, disciplined by local patriarchies (Froebel *et al.*, 1980; Fuentes and Ehrenreich, 1983). However, ethnographic study presents a much more nuanced picture of women workers. Women express consciousness of exploitation through diverse means, individually, collectively formally and informally resist and organise, engaging in cultural struggle as well as class-based struggle. The meaning of resistance is varied across different contexts (Rosa, 1994; Ong, 1987; Kabeer, 2004; Hewamanne, 2008). Moreover, workers commonly face contradictions in their working lives that are not easily translated into campaign narratives. For example women may develop a feminist-/class-based consciousness through their experience of work, but consent to hegemonic gender and class norms in society (Hewamanne, 2008). The challenge for trade unions and NGOs is to harness the spirit of resistance² women workers in FTZs exhibit to ensure that the possibilities presented by transnational advocacy are not lost, but rather, that mobilisation is sustained beyond a single campaign, resulting in long-term outcomes for women workers (Ong, 1987).

This discussion is based on 12 months of participant observation in an apparel factory in the Katunayake FTZ (KFTZ) in 2003, survey data collected from workers in the Katunayake FTZs and ongoing interviews and observations between 2001 and 2008. This chapter is organised as follows. I first provide a brief overview the working and living conditions in the FTZs, and modes of resistance by women workers. I then outline the characteristics of the two cases and the major outcomes of both, highlighting issues of framing, coalition building and mobilisation along

with the strengths and limits of each case. Finally, I conclude by offering possibilities for more inclusive transnational campaigns.

FTZ Labour, working conditions and organising women workers

During an education seminar for Sri Lankan export sector workers in Colombo, April 2003, I expressed interest in meeting some women FTZ leaders to an organiser of a progressive, politically independent trade union.³ He smiled and said, *'it will be like searching for the mythical tree in an imaginary forest!'* It was not the first time that (male) members of the traditional trade union movement had expressed this sentiment about the unorganisability of FTZ workers and women leadership in the contemporary labour movement. Although at this time, I had only spent four months in the field, participant observation demonstrated to me that informal women leaders on the shop floor were instrumental in organising shop floor action, seeking redress for worker grievances. This dissonance between wanting to organise FTZ workers but believing they were unorganisable on the one hand, and women's modes of resistance on the factory floor, informed much of the relationship between the broader labour movement and FTZ workers.

In 2003, the typical FTZ worker was a young unmarried Sinhalese Buddhist woman with no children.⁴ Employers in FTZs expressed a preference for rural women because of their perceived lack of political acumen, their obedience and discipline which would prevent workers from agitating for their rights. She was likely to have migrated from an impoverished village from the North Western, North Central, Southern and Central Provinces, having arrived in the FTZ for the first time at the age of 20. She was better educated than the first generation of FTZ workers, with the majority completing Year 11. Her parents engaged in cultivation activities; the family's average monthly household income in 2003 was Rupees 4,915 (US \$51). The majority were inexperienced industrial workers, although most had contributed to their household activity or worked as 'extra help' in their parents' income generating activities. The worker's remittances from FTZ employment helped to improve their family homes, and educate younger siblings. Workers resided in substandard housing run by residents and other private landowners. The conditions of the boarding houses were poor, with overcrowding, lack of facilities and insecurity being the main worker complaints. Workers encountered daily acts of violence through harassment in and outside of the factory, and local understandings of class, gender and migration stigmatised women because of anxiety over FTZ women's respectability (Hewamanne, 2008). However, life in the boarding houses gave workers greater freedom and exposure to new people, ideas, ways of being and new subaltern identities (Hewamanne, 2008).

Sri Lankan FTZs house, mainly labour intensive apparel factories producing garments for some of the most prominent brands in North America and the European Union including Victoria's Secret, Liz Claiborne, Tommy Hilfiger, Polo/Ralph Lauren, Nike, Gap, Marks & Spencer, Calvin Klein, and Gymboree. Apparel accounts for approximately 45 per cent of all Sri Lankan exports (Central

Bank, 2005). FTZ workers earned higher wages than the minimum wage for the garment sector outside the zones, but found it difficult to keep up with living costs. Promotion opportunities were scarce. Major grievances included increasing production targets, scolding and pressure from supervisors, and compulsion to work overtime over several days without rest.

Access to democratic worker representation to improve these conditions has been limited. Unions have to contend with workplace regimes predicated upon de-legitimising organised labour through paternalist management policies and the formation of in-house Workers' Councils aimed at containing worker grievances to the enterprise level. The administrative body responsible for the administration of investor services *and* employment relations in the zone, the Board of Investments (BOI) channels workers away from institutionalised grievance mechanisms, acting as a mediator in disputes (BOI, unpublished; Senior Industrial Relations Official, KFTZ 2003). Workers received little information about grievance procedures, collective bargaining and dispute settlement procedures from their employers. Most grievances were resolved through individual interaction with supervisors or managers. Workers did not believe that there were adequate grievance mechanisms within their respective factories, nor did they believe that management understood their needs. Although they utilised in-house Worker Councils as a voice mechanism, workers were cynical about their actual efficacy. Moreover, trade union members have reported that they have been subject to threats to their lives, dismissals, forced contracts or factory closure (see ITUC 2008 for cases).

Yet, workers engaged in collective and individual acts of resistance on the shop floor. In the factory where I worked, their relationship with supervisors for example was the most immediate site of protest and resistance. With lower order supervisors such as in-line quality checkers, workers asserted themselves as older sisters and used cultural admonishments to discipline and assert moral power in everyday interactions. Examining letters written by workers and submitted to an anonymous complaints letter box in this factory, workers complained about supervisor verbal harassment, favouritism and allegations of corruption. Other complaints included stagnant wages, entitlements, benefits and work intensity. Some workers were careful to express their gratitude towards their factory and stressed that the reason that they complained was out of loyalty for the factory. Indeed, in some of these, workers critiqued both the conduct of supervisors towards them as workers, and towards the factory as a whole. However, they threatened to quit if changes were not made. Intersections of class interests, worker identity and friendship shaped the character of solidarity action on the factory floor. Workers' sense of justice was grounded in the daily experience of work: did supervisors fairly or unfairly scold/punish them, were production targets within the control of workers, did a new policy unfairly disadvantage them? However, workers rationalised that these conflicts were just for the eight hours they were in the factory.

Labour protest has been a consistent theme of employment relations in the zones (Teitlebaum 2007). Between 1994 and 2003, there were 159 recorded work stoppages in the KFTZ (BOI unpublished), many of which involved only women workers (IR Manager, 2003). While 63 of the stoppages pertained to

wages, bonuses or EPF/ETF contributions, 43 pertained to issues of harassment or firing of fellow workers. Protest was not aimed at wholesale structural transformation of the workplace and employment relationship, but on *maintaining and enforcing* existing rights. The majority of these work stoppages unfolded without union organising, was short-term and collective organisation dissipated after the resolution (or suppression) of the problem. Workers, however, did believe in the instrumental efficacy of trade union representation during labour disputes (Gunawardana unpublished).

Transnational solidarity for freedom of association: the case of Jaqalanka 2003–2008

After a dispute over holiday bonuses at Jaqalanka in April 2003, which was not resolved at the Workers' Council, workers approached the FTZGSWU to form a branch union. Management was reluctant to recognise the union as a bargaining agent. Workers were intimidated and harassed leading up to the recognition referendum, which the union lost. This promoted a transnational campaign for another referendum and union recognition. The FTZGSWU had a long history in the FTZs. Its predecessor, the Industrial Transport and General Workers' Union (ITGWU) had first began to organise workers in nearby industrial areas, while simultaneously campaigning for organising rights in the FTZs in the early 1980s (see Gunawardana 2007 for extended discussion). The FTZGSWU drew on a membership base from FTZs Island-wide and numbered approximately 15,000 in 2008 (Marcus, 2008). Ninety per cent of the membership was women, who also occupy leadership and committee membership positions in the union. The FTZGSWU developed an organising strategy that involved targeting three strategic levels: the factory, the local/national, and the international. Locally, the union concentrated on identifying potential leaders. This was facilitated by their long partnership with a women worker labour NGO, the Women's Centre (discussed below). This partnership enabled the union to highlight the linkage between workers' rights, human rights and gender based rights in tandem with women's rights issues such as sexual harassment and living conditions in boarding houses through the 1980s and 1990s, which was rare in the traditional Sri Lankan union movement (Marcus, 2003). With the Women's Centre, the FTZGSWU acted in solidarity with other workers (e.g. plantation sector), and also maintained linkages to other local groups such as the *Gami Kantha Peramuna* (Peasant Women's Front) and the Mothers and Daughters of Lanka. Issues included environmental concerns, development policies, peace, and labour rights.

At the national level, the union lobbied and agitated for the implementation of existing labour law, and international labour standards. Grievance mechanisms such as labour tribunals, courts and advisory committees were utilised. The FTZGSWU maintained a database with information about garment factories, supported by the American Solidarity Centre, which includes information based on research as well as the testimony of workers (Gunawardana 2007). At the international level, the FTZGSWU attempted to influence trade negotiations with the European Union

(EU) regarding access to apparel markets and trade concessions for Sri Lankan producers. It is part of regional and global networks including women's groups, trade unions and human rights activists. Alliances include the Southern Initiative on Globalization and Trade Union Rights (SIGTUR), the International Textile, Garment and Leather Workers' Federation (ITGLWF), consumer based pressure campaigns such as No Sweat and the Clean Clothes Campaign (CCC, 2006), partnering with the Transnational Information Exchange Asia and NGOs such as the Asia Pacific Workers' Solidarity Links. These network relationships, developed over time, were activated during the Jaqalanka case. Cross border pressure from the CCC and the Fair Labour Association (FLA, 2008), along with international trade union confederations such as the International Confederation of Free Trade Unions (ICFTU) and the ITGLWF was mobilised. The symbolism used in the Jaqalanka campaigns was the suppression of organised labour, where workers actively wanted to form unions to represent themselves. The campaign focused on the lack of enforcement of labour rights, harassment of workers and threats including death threats made against them by management.

At the time, Sri Lanka was engaging in trade negotiations for the European Union's Generalized System of Preferences (GSP) concessions which provided duty-free entry to developing country imports, and apparel manufacturers were preparing for the MFA phase out (discussed below). The trade union argued that Sri Lanka should not be granted GSP concessions if manufacturers continued to violate core labour standards, as per GSP requirements. The case was brought to further international attention at the WTO ministerial meeting in Cancun (Gunawardana, 2007). As such, the FTZGSWU capitalised on the inherent insecurity of Sri Lankan apparel producers in the global economy, to push the BOI, buyers and Jaqalanka to ensure union recognition. The recognition of the FTZGSWU as a formal bargaining agent of worker in October 2003 was understood as a victory in the zone, a culmination of a global campaign that provided hope about the viability of such campaigns. Importantly, the case forced the BOI to amend their Labour Guidelines for investors, to include freedom of association and union recognition, and later influenced the BOI to stipulate that in-house Workers' Councils can *only* be formed in the absence of a trade union, rather than as a substitute as has been the practice.

Other than the importance of transnational action, the case demonstrated the importance of 'grassroots' organising by women's groups and trade unions working together (Gunawardana, 2007). The FTZGSWU mobilised its long standing local partnership with the Women's Centre, to maintain local level organisation among workers. Other NGOs such as Da Bindu (Drops of Sweat) Collective, and Right to Life (a group that advocates for human rights) attempt to confront gender inequality as a basis for political action in the workplace (Gunawardana, 2007). Run jointly or solely by women, they are distinguished from other women's movements in Sri Lanka by putting class and women's status as economic actors at the centre of their actions. By contrast, movements like the Mother's Front (de Alwis, 1998) mobilise cultural tropes around motherhood to create spaces of protest. The Women's Centre originated from a strike at the Polytex garments factory in 1982

on a neighbouring industrial estate to the KFTZ. Initially unionised by the Ceylon Mercantile Union, this strike was led by young women workers who broke away from the union and instigated a community based campaign in the face of police, state and management intimidation. The Polytex workers were strengthened by the support of the ITGWU and the Marxist and Feminist inspired Women's Liberation Movement (WLM). From the mid 1980s, The Women's Centre has been led by Padmini Weerasooriya, a former Polytex worker, and later in conjunction with Sriya Ahangamage, a worker who gained leadership skills through her association with the Women's Centre (Weerasooriya, 2003). The Women's Centre has branches in all three major FTZs, and aims to reorient women's work as a valuable service to the national economy, and counter stigma around FTZ work (Gunawardana, 2007). The Centre provides legal advice and legal aid to women who have been raped or assaulted; assist women find suitable boarding houses; provide recreational activities, facilities and opportunities to meet other women workers and develop close ties; make interventions during grievances; and education, training, promotion of self-organising and leadership capacity. Emphasis is placed on identifying and training potential trade union leaders through a gradual process of participation, confidence building, and raising awareness (Gunawardana, 2007). As many women are neophyte workers, creative expression through writing and performance has been instrumental to mobilisation, and cross-border solidarity with other workers, as in regional meetings in Nepal in December 1994, New Delhi in 1995 and Bangkok in 2002. Moreover, they aim to foster solidarity with men, and other working communities (Women's Centre, 2006: 73), as well as addressing ethnic relations. For example in 2003, I accompanied the Women's Centre to Eastern Sri Lanka, where they met Tamil workers affected by the conflict, and engaged in worker-to-worker discussions (albeit through an interpreter). The Women's Centre is a part of local, regional and transnational networks. Locally, they are connected to feminist organisations such as the Women and Media Collective, and to various NGOs in the plantation, agrarian and peace movements. Regionally, they are connected to networks such as the Committee for Asian Women (CAW). Globally they are a part of alliances and networks such as the UK based Ethical Trading Initiative, HomeNet, the CCC and Oxfam.

Despite the promise of the Jaqalanka victory, in March 2008 the factory announced the closure of all three Sri Lankan factories and went into liquidation. Out of the 1,400 workers who lost their jobs, majority were women. According to Anton Marcus, General Secretary of the FTWGSU, the working relationship between the union and Jaqalanka was conducted on relatively good terms. The union was given check-off facilities, the workers were allowed to attend meetings during work time, and the union was allowed to have meetings inside the factory. There was no dispute at the time although since 2006, the union had been unsuccessfully trying to enter into a collective agreement. Worker demands included payment of wages on time, elimination of excessive overtime, and forced night work (Marcus, 2008). The reason for the closure given by Jaqalanka management was that they could not absorb high labour costs; the price that one of their major clients, Nike, was paying them was reduced in the post MFA-era (Marcus, 2008; FLA, 2008).

The closure of Jaqalanka brings into sharp focus the efficacy of factory by factory unionisation efforts. Employers remain evasive about engaging with unions. In the post MFA phase, apparel producers compete with India and China. Buyers are allegedly paying their subcontracted factories less by as much as 25 per cent (General Manager, 2006). Two Jaqalanka committee members who obtained employment at Brandix, a leading garment manufacturer, were allegedly told not to come back after reporting to work, because of their committee position. Whereas in the past, employers refused outright to hold referendums for union recognition, now, amidst the pressure to adhere to labour standards, employers hold the referendums, but refuse to bargain with the parent union, preferring to bargain with the branch union, which may be problematic as workers may be inexperienced in bargaining.

To counter these concerns, Marcus reported that the union would continue to take action globally and locally. The FTWGSU is part of a wider group of Sri Lankan unions⁵ who have set up a Trade Union Congress to develop a road map to be presented to both the Joint Apparel Association Forum (JAAF, 2008),⁶ and the government to promote the European Union's GSP in conjunction with monitoring mechanisms, tripartite dialogue and continuing global partnerships with the FLA, Workers Rights Consortium, the ITGLWF, ITUC and ETUC (Marcus, 2008).⁷ Information dissemination and awareness raising with the Women's Centre continues, as does supplication for buyers intervention (Marcus, 2008). An international network of activists including the CCC continue to utilise tools such as letter writing directly to factory management and social networking sites such as Facebook in solidarity with the union when needed. Most recently, the union has sought to build linkages with other FTZ workers and unions in the Asia Pacific region (Marcus, 2008). Interestingly, the apparel industry has attempted to use ethical manufacturing processes as a source of leverage in the global apparel market, to appeal to consumers in the Global North. Producers implemented an ILO sponsored factory improvement programme funded by the US Department of Labour. The 'Garments without Guilt' campaign, launched in 2006, centred on a certification process by an international certification group SGS, is designed to ensure companies comply by local and international standards labour standards. A Rs 30 million 'social awareness programme' around a 'public-private partnership' was announced, aimed at 'elevating the social position of thousands of working women in the garment sector, from the marriage market to the job market' (Samaraweera, 2008).

Initiating local solidarity through an international campaign: Oxfam and ALaRM 2002–2007

The Apparel-industry Labour Rights Movement (ALaRM), was a Sri Lankan coalition of local NGOs and trade unions bought together by Oxfam International, a TAN which is 'organised to promote causes, principled ideas, and norms, and they often involve individuals advocating policy changes' (Keck and Sikkink, 1998: 8) around a wide variety of issues. One of Oxfam's goals is to find 'lasting solutions to poverty, suffering and injustice' by addressing the structural causes

of poverty (Oxfam, 2009). Founded in Great Britain in 1942, Oxfam International is a confederation of 13 northern-based NGOs. These NGOs work with over 3000 varied local organisations in over 100 developing countries (Oxfam, 2009). Oxfam like many other global NGOs stressed the importance of 'empowerment' and 'participation' of these organisations and communities. ALaRM was a part of the wider Oxfam campaign, 'Make Trade Fair' launched in 2002. 'Make Trade Fair' focused on free trade in pharmaceuticals, coffee bean, garments and agricultural products (Atkinson, 2007: 1). For the apparel section of the campaign, Oxfam partnered with the CCC, ICFTU and Global Unions to target the 2004 Athens Olympics to draw attention to the exploitation of workers sewing clothes for sports brands (Atkinson, 2007: 6). In Sri Lanka, ALaRM was funded by Oxfam Australia, Oxfam Great Britain, and Oxfam Novib, and managed by the Regional Strategic Team for South Asia. A project coordinator and project office was appointed in Sri Lanka, both to be based out of Oxfam Australian offices in Colombo. The impetus to form the ALaRM coalition was the scheduled 2005 phase out of the MFA (Gowthaman, 2003; Subasinghe, 2008). The MFA was a trade agreement set up by the US and the UK in 1973 to restrict the import of cotton, wool and man-made fibre products via a quota system. However, the quotas gave developing countries access to guaranteed markets, protecting them from competition from countries such as China or India. Its dismantling meant that Sri Lankan producers would be faced with greater regional competition and the country could be faced with lost export earning and jobs (Dent and Tyne, 2001). The goal of the campaign was to mitigate these negative ramifications stemming from apparel producer's vulnerability in supply chains.

In 2002, Oxfam facilitated meetings between the main NGOs, trade unions and women's groups working on Sri Lankan FTZ issues. ALaRM was comprised of groups like the Women's Centre and the FTZGSWU, which had experience with organising women FTZ workers. Other coalition members included: Da Bindu Collective, All Ceylon Federation of Free Trade Unions; Jathika Sevaka Sangamaya (an affiliate of the United National Party); Right to Life Labour; Sri Lanka Nidahas Sevaka Sangamaya; United Federation of Labour; and Young Christian Workers. This coalition was named the Core Advisory Group in Oxfam's own literature about this campaign (Atkinson, 2007: 19). Oxfam found that the groups were fragmented and uncooperative due to capacity differences, turf wars, personality clashes and competition over international funding (Atkinson, 2007). However, the groups expressed interest in getting together to form a coalition. Oxfam, keeping with its articulated position on self mobilisation and empowerment (Oxfam, 2009), defined its role as a facilitator and coordinator as well as providing technical expertise such as research skills and supporting funding (Subasinghe, 2008). An important aspect of framing was the way in which Oxfam presented the unity of the coalition as a group of locally divided actors, working together for the first time. However, even without Oxfam, the groups have come together at various moments (Samanmali, 2003; Weerasooriya, 2003), particularly at forums promoting women worker's rights or during times of government crackdown in the 1980s and 1990s (Fernando, 2003). Moreover, grassroots organisations already engaged

in alliances to mobilise workers, as in the Jaqalanka case. It was ultimately these local connections that were important for building a critical mass of workers for the ALaRM campaign. This is not to deny that the relationship between groups operating in the FTZs has been historically fragmented. This tension is particularly acute, given Sri Lankan NGO's reliance on foreign grants from international sources. The organisations feel they need to compete for these funds, limiting continuous linkages (Weerasooriya, 2003; Chamilla, 2008).⁸ In this respect, Oxfam took competition out of the equation by providing the coalition with funding to carry out common goals.

What was unique about ALaRM was the continuous association and strategic mobilisation of the coalition and the efforts of the project coordinators aimed at ensuring that the coalition stayed together through consensus building and conflict mediation. Through a series of meetings the coalition came up with four issues that campaign would concentrate on: compensation for possible factory closures after the phase out of the MFA; advocating a living wage for garment workers; living conditions of boarding houses; and freedom of association. The campaign targeted three key groups. First were the labour activists themselves. Members of the coalition were provided with background notes and briefings in Sinhala and a series of 'learning sessions' was organised with experts. Oxfam attempted to address two central limitations of the labour movement in Sri Lanka, the lack of female labour leaders and the lack of a second line of leadership by requesting each organisation send at least one female representative, and providing training programmes for second level activists (workers or former workers). Second, the campaign addressed local policy makers and employers, but not global corporations. Oxfam lobbied international donors and government ministries. In February 2004, the campaign was launched in Colombo with the release of a global Oxfam report on the rights of women garment workers, putting gender issues at the centre of their campaign by highlighting the contribution of women to the economy. Sri Lankan women were portrayed as 'hard-working, talented, . . . a significant and pivotal role in the success of the country's apparel trade' (CCC, 2006), yet victims of precarious employment, poor conditions and exploitative outsourcing problems (Atkinson, 2007: 21). Oxfam targeted the media directly and attempted to create a group of 'friendly' media persons who would cover MFA related events. The launch attracted the attention of government departments, the ILO, BOI, employer associations, trade unions, embassies, the World Bank, print and electronic media (Atkinson, 2007: 21). Both Oxfam and the members of ALaRM reported that it was the Oxfam name that bestowed legitimacy among these officials. However, this legitimacy is problematic in a context where trade unions are de-legitimised. Rather than engaging in the more (admittedly contentious) politics of confronting trade union suppression, claims to TAN legitimacy is a double edged sword: on the one hand, this opens up a space for local unions and NGOs to access policy makers. On the other, this plays into the hands of employers not wanting to engage directly with unions. This raises questions about the role of TANs in local campaigns: do they act as worker representatives, or give representations of worker interests? Third, the campaign targeted workers. In 2004, members of the coalition worked

with 100 workers to raise awareness of the campaign. The campaign was then launched publically at an event that featured songs and dance to raise awareness of the MFA phase out, introduced ALaRM as a worker representative, and raised awareness around the four key issues. Limited attempts were also made to reach workers in rural Hambantota, Anuradhapura and Polonnaruwa. Other events staged as part of the campaign included a May Day procession with music and cultural events in the Katunayake FTZ. In 2006, 25,000 signatures were collected from private sector workers including garment workers and handed to the Presidential representative demanding a wage rise that had been given to other private sector workers. Workers were informed of this signature campaign through three musical events in the FTZs (Atkinson, 2007). The coalition also ran advertisements for workers advising them of a worker hotline they could call for information in the event of retrenchment (Atkinson, 2007; Subasinghe, 2008).

ALaRM did not set out to directly improve working conditions. Trade union members believed that the only way to do this would be to let workers organise unions, rather than having the coalition lobby directly for improvements (Atkinson, 2008). Moreover, tensions between personalities as well as between agendas made coordination difficult at some times. This issue was highlighted in the way in which members regarded Workers' Councils. Da Bindu and Right to Life had been identifying potential worker activists among shop-floor workers. Their rationale was that these workers would provide a much needed active link between workers and the campaign. Forty-five workers who were attached to the in-house Workers Councils in eight different factories were mobilised. However, some of the trade union members of the coalition contested this saying Councils were sanctioned by the BOI and employer groups as union's substitutes, and representatives to the Councils are not always elected fairly. They felt that by aligning themselves to the Councils, the NGOs were undermining the right to form trade unions (Marcus, 2008; Atkinson, 2007).

The ILO sponsored a multi-stakeholder conference in July 2004 based on ALaRM research. The outcome was an ILO sponsored Taskforce on the MFA phase out. Members included five members of ALaRM, an Oxfam representative, Secretary to the Minister for Labour, the Commissioner for Labour, the Joint Secretary General of the JAAF, the Industrial Relations Officer of the BOI, and representatives from the Ministry of Finance, Ministry of Trade and Ministries of Industries. Although there were allegations that the BOI and employer groups were not cooperative with this process, the Taskforce produced a promising position paper and action plan that highlighted compensation, retraining and placement of workers (Atkinson, 2007: 22; Subasinghe, 2008). However, the momentum generated through the launch of the report and the taskforce was interrupted when the country was struck by a devastating Tsunami on Boxing Day 2004. Government and civil society diverted their attention to relief and reconstruction efforts. Research played a crucial role in the campaign. Oxfam lent its support, both monetarily and with technical expertise to the Department of Labour for a large-scale survey of 745 garment factories Island-wide in 2004 and later in 2006 (after the phase out of the MFA). The information elicited from that survey has been

disseminated to factory management and owners, and government departments. Moreover, buyers were also surveyed in 2004 to gauge their purchasing trends. The Da Bindu Collective surveyed boarding houses to assess living conditions. Data was collected in September–October 2005 from 850 garment workers across nine districts (Atkinson, 2007: 31) to calculate a living wage for garment workers. In 2006, ALaRM released the findings; for basic necessities and proper nutrition, workers needed at least 12,000 rupees per month in the FTZs and about 10,000 outside (Atkinson, 2007). Trade unions used this information in their negotiations with employers.

Yet, ALaRM was unable to engender policy change and there was no evidence that employers were influenced to change (Atkinson, 2007: 37). Members were unable to devote 100 per cent of their time to ALaRM, and the coalition found it challenging to balance all four issues identified (Subasinghe, 2008). Owing to logistical reasons, ALaRM was unable to follow up with retrenched workers to monitor the effects of the phase out and to see if they were being treated fairly (Atkinson, 2007). I could not access any information on the effects of the worker targeted actions such as the concerts or petitions. Nothing was achieved regarding the living conditions and workers remain largely unorganised, despite efforts at raising awareness around freedom of association rights (Atkinson, 2007: 38–39). Interestingly, Oxfam attributed the rather limited outcomes of ALaRM to the lack of political clout among members and the limitations and tensions within the coalition (Atkinson 2007).

Discussion and conclusion

Jaqalanka was a short-term campaign that relied on the mobilisation of long-term transnational and local relationships to support workers who desired organisation. This union-led campaign resulted in changes that had a potential long-term impact. Although union recognition was gained, the union had been unable to institute a collective agreement, so wages were not affected. However, having the union meant that a more effective voice mechanism was put into place. Overall, the experience strengthened the unions resolve to utilise and build on transnational campaigning, and also forced the BOI to amend its guidelines for investors, removing one structural impediment for unionisation. By contrast, the Oxfam campaign had a long-term orientation, but short-term results. Policy change was not implemented, and there was little material change reported. But the knowledge generated has been considered as valuable by policy makers and trade unions. This top–down approach meant that there were more resources for awareness raising, organising and education activities. Interestingly, Oxfam was not only supporting the campaign, but provided resources for the Department of Labour as well.

The question remains however, to what extent campaigns incorporated workers. Workers were the backbone of the Jaqalanka campaign; they sought out the assistance of the union after internal grievance procedures failed. Jaqalanka women workers took a leading role in the campaign, one leader appearing on a televised Q&A panel about working conditions with the Minister of Labour, while others, as

members of the Women's Centre, took part in a regional meeting of South Asian women's labour activists in Sri Lanka. In the case of ALaRM, workers were drawn into the campaign after discussion with the leaders of coalition. They were largely treated as beneficiaries of knowledge, and while their narratives were utilised during media campaigns after the phase out (Atkinson, 2008: 18) women workers did not directly engage with ALaRM, other than as members of the coalition groups. However, ALaRM did attempt to address the gendered leadership issue, and develop and include potential women worker leaders in the campaign.

As reported in this chapter, ethnographic research enables us to bring to light women workers' modes of resistance. Although workers were thought to be unorganisable by the wider Sri Lankan labour movement, and management hired them believing that they lacked the acumen to organise, women engaged in different modes of resistance, including short-term self-organising on the factory floor. This micro-struggle is important for workers in their day-to-day lives. Workers protested work intensification, increases in production targets, scolding or excessive overtime. Under the restrictive grievance procedures available to workers on the shop floor, FTZ workers utilised the Worker's Council, anonymous letters or informal leaders made representations to management and supervisors alongside actions such as talking back or subversive forms of disruption. If the issue had escalated into a strike, then workers may have sought the assistance of a trade union to help break the impasse and win their rights. At the heart of this action, workers struggled to maintain their existing standards and have employers comply with local labour laws and international labour standards. Examining the macro level work stoppages data, workers went on strike over wages, bonuses and issues of harassment or firings of fellow workers.

Yet, women exhibited a self-limiting radicalism, for example, asserting that the conflicts were 'eight-hour conflicts'. Elsewhere, Hewamanne found that some FTZ women became aware of 'macrostructures of domination' and also of the need to unite and create an organisation of their own to address directly the government of Sri Lanka, and investor nations (2007: 129–31). Hewamanne argues that 'significant cultural, structural, and spatial circumstances impeded the development of their micropolitical activities into transformational political struggle' (2007: 131). This is really where those interested in transnational organising must pay attention. If workers exhibit class and gender consciousness, but are limited in transforming their struggles into mass mobilisation, TAN action which is project-based and short-term focused is not helpful in overcoming the barriers to mobilisation. What is striking is that local mobilisation has been successful where the nuances of women's lives – the cultural, gendered and spatial circumstances – are accounted for, as in the case of groups like the Women's Centre, and the FTZGSWU. While a factory to factory mobilisation is risky given the nature of global production relations – as the closure of Jaqalanka attests – a multi-faceted approach which combines strengths of the 'top-down' and 'bottom-up' might work best in organising and mobilising FTZ workers. That is, utilising the resources and access to decision makers that TANs have and ensuring that worker's own modes of resistance is accounted for and supported at the local level by trade unions and NGOs.

Thus, it is not surprising that the FTZGSWU is sticking to its strategy of local organisation, national-level advocacy and transnational support and importantly, making tentative steps to reach out to its regional FTZ counterparts, to begin the hard work of creating a truly transnational organising strategy for FTZ workers.

Notes

- 1 These figures do not account for the global economic downturn in 2008–09.
- 2 In *Spirits of Resistance and Capitalist Discipline* (1987), Aihwa Ong examines the way in which Malaysian FTZ women workers engaged in informal acts of resistance.
- 3 The major trade unions in Sri Lanka are arms of political parties.
- 4 The statistics given here are based on a survey of 101 workers in the Katunayake FTZ, carried in 2003 by the author. See also Kelegama and Epaarachchi 2002.
- 5 FTZGSWU, Progress Union, All Ceylon Federation of Free Trade Unions, Health Services trade Union Alliance, Confederation of Public Sector Independent Trade Unions, Ceylon Teachers Union, Railway Trade Union Front, Union of Post and Telecommunication Officers.
- 6 JAAF is a peak body made up of the Sri Lanka Apparel Exporters' Association, the FTZ Manufacturers' Association, the National Apparel Exporters' Association, the Sri Lankan Chamber of Garment Exporters and the Sri Lanka Garment Buying Offices Association.
- 7 At the time of writing, the EU is threatening to withdraw concessions based on human rights violations associated with the civil conflict.
- 8 Activists also complained about the 'strings' such as time intensive reporting requirements, that come attached with the funding.

8 **Victory through solidarity?**

The story of a women workers' strike in Turkey's Antalya Free Zone

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On 26 September 2006, more than 80 women workers went on strike in Turkey's Antalya Free Zone. The strike followed in the wake of a drawn-out dispute related to working conditions and organising at Novamed – a subsidiary of the Germany-headquartered company Fresenius Medical Care (FMC), which is 'the world's largest integrated provider of products and services for individuals undergoing dialysis because of chronic kidney failure'. (FMC, 2009: 9) With at least a certain amount of success on the part of the workers and their union, a negotiated settlement of 18 December 2007, brought the strike to an end. In this chapter, we examine how practices of solidarity across levels, borders and social groups contributed positively to what has been hailed as a great 'victory' for the strikers. Acknowledging that a victory can quickly turn into a defeat, we also discuss some challenges or limits related to solidarity across borders and social groups beyond the strike itself.

In what follows, we begin by narrating the struggle on the part of the Novamed workers to organise and obtain a collective agreement at the workplace. In the second section, we map the support and solidarities at work in the Novamed struggle. The third section assesses the role played by solidarity in connection with the immediate aims of improving working conditions and concluding a collective agreement at Novamed. This is followed by a discussion on solidarity beyond the strike, and we round off the chapter with a few concluding remarks.¹

From organising to collective agreement at Novamed

In September 2004, some workers at Novamed initiated a campaign to establish a union in the workplace. This campaign was motivated primarily by two factors: First, dissatisfaction with the salaries at Novamed. While above the minimum wage and not the lowest within the Antalya Free Zone, the salaries were supposedly lower than those found in companies within similar lines of business in Turkey (Interview No. 1). Second, dissatisfaction with the more general working conditions at Novamed. According to the organised workers and their union, the conditions that existed at the time when the organising was initiated included queuing for permission to become pregnant, toilet use monitoring, the need for permission to get married, restrictions on communication among the workers, very

short work breaks, various kinds of humiliating treatment, and attempts to control what the workers did when off the clock (Petrol-İş, 2008: 8, 32).²

The actual organising at Novamed was kicked off by a male worker with prior union experience and some contacts in the regional branch of the Petroleum, Chemical and Rubber Workers' Union of Turkey (Petrol-İş). This worker initially mobilised and introduced two male co-workers to representatives of Petrol-İş and, together with the union, they developed a strategy whereby the further organising at Novamed would be done secretly through either the establishment of small groups of workers, or one-to-one communication with individual workers – this, against the background of the general union hostility in Turkey. In both cases, they utilised community-based relations among the workers, and also engaged directly with some of the workers' families. Meetings with small groups of 'trusted' workers and some of their family members took place in the homes of those driving the organising, and newly recruited members were later introduced to and received training from Petrol-İş representatives (Interview No. 1). The two initial such union meetings were arranged in January and March 2005 with 15 and 80 workers respectively (Petrol-İş, 2008: 8, 228).

Even if the strategy worked fairly well – with 158 out of 264 workers unionised by April 2005 – the organising came to the attention of the Novamed management, which allegedly engaged in various activities aimed at undermining it. According to the workers and their union, this counter-campaign consisted of two elements: First, the management engaged in intimidation and psychological blackmailing of a general kind – this, for instance, by stressing that the workers were indebted to them for their jobs, and threatening to move the factory to another country, to make the working conditions worse if there was a union, and to treat organised workers worse than non-organised ones. Second, the management allegedly engaged in harassment and humiliation of a more individualised kind – this, for instance, by giving known union members more heavy workloads or schedules, and cross-interrogating workers suspected of being or considering to become organised (Interview No. 1; Petrol-İş, 2008: 80, 228).³

Due to some workers quitting the union, Petrol-İş pushed ahead with the formalities related to organising in Turkey. Upon its request, the Ministry of Labour and Social Security (MLSS) officially designated the sector in which the Novamed workers should be organised as the one covered by Petrol-İş in late March 2005. With that settled, Petrol-İş applied to the MLSS for a certificate of authorization at Novamed on 11 May 2005. Although the number of organised Novamed workers had dropped to 136 by this date, it still constituted the majority as required for a union to obtain legal competence to conclude a collective agreement at a workplace, and Petrol-İş was recognised by the MLSS as having organised the majority of Novamed workers on 8 June 2005. When informed about this, Novamed filed a court case based on the claims that both the sector designation made by the MLSS and the reported numbers of Novamed employees and unionised workers were erroneous. These claims were rejected by the Antalya Labour Court on 8 December 2005 (Document No. 1), and Novamed's appeal of the decision was likewise rejected by the High Supreme Court on 6 February 2006 (Document No. 2).

Although Petrol-İş was finally granted a certificate of authorization by the MLSS in March 2006, Novamed's legal challenge had clear implications for the workers' campaign. First, it significantly delayed the point at which the workers could engage the management in collective bargaining through the union of their choice. Second, it allegedly gave the Novamed management additional time to counter the organising efforts. On the one hand, it initiated some improvements in the working conditions – this, allegedly, in order to avoid additional workers joining the union and, perhaps, to get some others to quit it. On the other hand, the management intensified its efforts to force workers to resign or quit the union (Interview No. 3; Akgökçe and Kaplan, 2006). Two organised workers were dismissed in October and November 2005 respectively, and the overall number of unionised workers went down from 136 to 117 during the court case period.

Having received the certificate of authorisation for collective bargaining, Petrol-İş invited Novamed to initiate negotiations on 31 March 2006. In accordance with legal requirements, the invitation letter included a set of proposals that would serve as the basis for subsequent negotiations. The parties met four times in April and May 2006, and although the atmosphere of the negotiations is said to have been friendly, there were what proved to be irresolvable disputes related primarily to financial and procedural issues (Interview No. 4; Interview No. 5). In late May 2006, the union concluded that there was no point in continuing negotiations for the full two months allowed for by the law, and declared the negotiations inconclusive (Interview No. 5). In accordance with legal procedures, the MLSS automatically referred the dispute to arbitration, and appointed a university professor as the arbiter. The arbiter made some suggestions aimed at reconciling the differences, and brought the parties together for direct talks on 6 July 2006. However, this could not resolve the dispute, and the arbiter's report of 17 July 2006 declared that no agreement had been reached between Novamed and Petrol-İş (Document No. 3).

The inconclusive arbitration left Petrol-İş with the options of either deciding to call a strike in 7–12 days, or losing its certificate. While acknowledging its weakness related to both the majority of Novamed workers no longer being organised, and a prospective strike involving primarily young women with no prior union experience, it nonetheless decided to call a strike. However, this call would be followed by a request for a strike ballot, and the hope was for the result to be negative so that the union could refer the case to the High Court of Arbitration (Interview No. 5). Accordingly, the union declared its decision to call a strike on 11 August 2006, and 83 organised workers filed a strike-ballot request with the MLSS's Regional Directorate of Labour shortly thereafter. When the ballot was held on 25 August 2006, 289 out of 315 workers participated, with 87 and 199 valid votes against and in favour of strike respectively (Document No. 4). While the votes against were cast by organised workers, the vast majority of votes in favour were cast by non-organised workers – this, allegedly, with the support of the Novamed management (Petrol-İş, 2008: 16). Left with the options of going on strike within 60 days or losing its certificate, the union initiated a strike on 26 September 2006.

At the outset, the strike seemed doomed to fail. First, only 85 of the 117 organised workers went on strike – the remaining ones deciding not to join either

because of the likelihood of it being unsuccessful, or with reference to their legal right not to participate (Interview No. 1) – and they counted for little more than 26 per cent of Novamed's overall workforce at the time. Second, the strikers were for the main part women assembly workers rather than male workers occupying more strategically important positions (e.g. technicians, laboratory workers and sterilisation personnel), and whose absence from the workplace would have had a more immediate impact on Novamed's ability to maintain business as usual. A related reason to why the strike was unlikely to achieve much is that Novamed had increased its workforce in the run-up to the strike, with 49 new workers recruited in the period between the break-down of negotiations on 19 July 2006 and the union's strike announcement of 11 August 2006, and an additional 26 new workers recruited in the period between the strike announcement and the initiation of the strike on 26 September 2006 (Document No. 5). According to Petrol-İş, Novamed also made extensive use of overtime work and employed scab workers during the strike.⁴

In spite of their weak position, the strikers remained resilient, and following more than a year with hardly any contact between Petrol-İş and the Novamed management, negotiations were re-initiated in late October 2007. The two parties met twice in Istanbul before concluding a three-year collective agreement on 18 December 2007. According to the agreement (Document No. 6), the strikers would return to work on 2 January 2008, and their wages would then be increased with 9.2 per cent compared with what they were when the strike began. Furthermore, the workers covered by the agreement would receive wage increases as follows over a three-year period: five per cent for the first year, and four per cent for the second and third year. Lastly, the agreement contained a 'social package' whereby workers would receive a payment for each of two religious holidays, as well as productivity and attendance bonuses. To the strikers, their union and most supporters, the conclusion of a collective agreement at Novamed represented a great victory.

Solidarities at work in the Novamed struggle

While the degree of victory can be questioned, whatever was achieved in and through the strike at Novamed was a product of efforts made not merely by the strikers and their union, but also by their many supporters inside and outside of Turkey. In what follows, we provide a fairly comprehensive overview of who did what in support of the Novamed workers on strike.

Strikers

Strong mutual support prevailed among the workers on strike, the clearest indication of which was the fact that only three strikers quit the union and returned to work in the course of the strike. While some of the strikers were linked to each other through community-based ties – this, as a result of Novamed's recruitment practices drawing on such – many others knew little of each other before the strike. However, being on strike together proved to have a strong unifying effect.

Not only did they picket together and further develop a common understanding of their position at the workplace, but they increasingly also engaged in common activities like dining and swimming, participated in each others' engagement and marriage celebrations, joined the mourning of deaths inside of co-strikers' families, and developed close friendships that involved also other family members (Interview No. 6).

Families

While several workers experienced difficulties with their families in the process of organising at Novamed, they overall got strong support from them during the strike itself (Yılmaz and Akgökçe, 2007). At the outset, some workers hesitated to join the union due to a fear of how their families would respond to it. To some extent, this problem was overcome with a strategy aimed at incorporating families – or, to be more specific, male family members – in both the organising and the strike. A case in point concerns a woman worker who quit the union when her husband threatened to divorce her, and re-joined it after her husband had been involved by the union (Interview No. 1). When asked during the one-year strike anniversary if their fathers, husbands, brothers and boyfriends had been supportive or obstructive in connection with the strike, the women workers on strike responded collectively that they had been very supportive. Needless to say, the extent and type of support provided by family members varied a lot.

Local actors

After the strike ballot left the union with no option but to go on strike, a group of organised workers approached various local actors in order to get support. Guided to some extent by a very supportive journalist, they contacted branches of political parties, municipalities, professional associations, and media institutions in Antalya (Interview No. 7). With respect to political parties, they received extensive support from the local branches of centre-left and more left-wing parties. Representatives of such parties paid solidarity visits to the picket line, and several of them signed a broad-based leftist press announcement in support of the strikers on 12 November 2006, provided material support during the strike, and took active part in the one-year strike anniversary. The strikers received similar support also from two municipalities governed by the centre-left Republican People's Party, one of which also made locations available for the strikers to arrange charity fairs to raise money through the sales of home-made food and handicraft products.

Among professional associations, the local branch of the Chamber of Dentists provided free dental care during the strike, while the branches of the Chamber of Pharmacists and the Chamber of Electrical Engineers provided various kinds of solidarity support (including food aid). The last mentioned chamber was particularly supportive, and even the Istanbul branch organised a meeting on the strike, and contributed financially to solidarity visits on the part of women's groups in connection with the one-year strike anniversary. Complementing this, the local

branch made its facilities available to the visitors during their stay in Antalya (Interview No. 8). With regard to the media, the Novamed strike was covered by all local newspapers, but received particularly supportive coverage by two newspapers (Akdeniz Gerçek and Antalya Körfez) as well as the local branches of two leftist TV stations (Ulusal TV and Hayat TV). With respect to wider coverage of a supportive kind, mentioning can be made also of a few leftist newspapers (Evrensel and Birgün) and portals (Bianet and Sol).

Petrol-İş

Although there were some differences of opinion in the central office in Istanbul, Petrol-İş provided strong support to the Novamed workers not merely during the strike, but since the organising was initiated in late 2004. While the organising strategy was developed and implemented by the regional branch, the central office contributed with training of organised Novamed workers, gathering of information from and enlisting the support of unions outside of Turkey, as well as with legal assistance in connection with court cases and the collective bargaining. After the strike was initiated, Petrol-İş provided the strikers with both regular and irregular payments, as well as material help packages consisting of food and other necessities. Beyond material support, Petrol-İş organised weekly meetings and training of the strikers, arranged press conferences, and sought to give the strikers as much positive publicity as possible through media engagement. The Petrol-İş leadership paid several visits to Antalya, and also arranged the statutory meeting of its Council of Presidents there in mid November 2006 (Petrol-İş, 2008: 15). In a strike support action without precedence in Turkey, the union presidents altogether paid a visit to the picket line. Last but not least, Petrol-İş put a lot of effort into mobilising other actors in support of the Novamed strikers. An early case in point was the initiation of a LabourStart online campaign in late October 2006, which received 2,178 supporters before it was closed. While additional mobilising efforts were initially directed at other unions, they later targeted also women's groups.

Other unions in Turkey

The Novamed strikers received extensive support from the confederation with which Petrol-İş is affiliated, namely the Confederation of Turkish Trade Unions (Türk-İş), as well as from other unions affiliated with it. Although Türk-İş was quick to express solidarity after the strike was initiated, and several representatives – including the General Secretary – paid solidarity visits to the picket line during the strike, most of its support was channelled through its regional union representative, the Road, Structure and Construction Workers' Union of Turkey (Yol-İş). This union not only paid multiple visits to the picket line and provided food aid to the strikers, but also made its facilities available for Petrol-İş's meetings, and actively sought to mobilise other local unions in support of the strikers. In addition to ordinary solidarity support, the Forestry-Irrigation-Agriculture and Agriculture Industry Workers' Union of Turkey (Tarım-İş) also made its

facilities available to Petrol-İş, while the Postal, Telegraph, Telephone, Radio and Television Workers' Union of Turkey (Haber-İş) became a very active supporter when its own members went on strike at Türk Telekom in November 2007. Mutual visits on the part of union representatives at the two workplaces represent one of the few instances of worker-to-worker solidarity in connection with the Novamed strike. Beyond Türk-İş, the Novamed strikers received support also from the local branches of the Confederation of Progressive Trade Unions of Turkey (DISK) and the Confederation of Public Employees' Trade Union (KESK), which signed the broad-based leftist press announcement in support of the strikers in November 2006, paid several solidarity visits to the picket line, and took actively part in the one-year strike anniversary (Interview No. 9).

Unions outside of Turkey

The strikers and Petrol-İş received strong support from several unions located outside of Turkey, particularly from those with which Petrol-İş was institutionally affiliated – namely, the German Chemical, Mining and Energy Industrial Union (IG BCE), the European Mine, Chemical and Energy Workers' Federation (EMCEF), and the International Federation of Chemical, Energy, Mine and General Workers' Union (ICEM). These unions were engaged by Petrol-İş in connection with Novamed already in January 2005, and were regularly informed about the organising efforts among the workers (Petrol-İş, 2008: 227–50). Upon requests for assistance related to problems at Novamed, IG BCE and EMCEF provided Petrol-İş with information about FMC, and played central roles in bringing cases of alleged worker harassment and union repression to the attention of the FMC management – this, either by communicating and meeting directly with it, or by bringing such cases before the FMC Works Council (Interview No. 10; Interview No. 11).

Following the initiation of the strike in late September 2006, the unions in question engaged in various activities aimed at supporting the Novamed strikers and Petrol-İş. First, they initiated solidarity campaigns, with EMCEF preparing a 'protest letter' in October 2006, and ICEM preparing a 'support letter' in connection with 8 March 2007. Second, they organised solidarity visits to Antalya, with EMCEF General Secretary and IG BCE International Department Representative visiting Novamed in April 2007, 16 energy-sector trade union leaders from various countries visiting the picket line in May 2007, ICEM General Secretary and Chemicals and Rubber Industries Officer visiting the strikers in August 2007, and a four-person ICEM Women's Committee delegation paying a visit in connection with the first anniversary of the strike. Third, the ICEM Executive Committee passed a resolution on the strike in May 2007. Last, they made 'efforts behind the scenes' (ICEM, 2007) or engaged in quiet diplomacy vis-à-vis the FMC management in Germany in order to get the dispute resolved.

In response to calls for solidarity on the part of not only Petrol-İş, EMCEF and ICEM, but also union women connected to women's groups, a large number of union representatives from across the world expressed solidarity by sending

support faxes and emails to the strikers and Petrol-İş, and protest faxes and emails to Novamed and FMC managers. Such solidarity action was particularly prominent in connection with the strike's first anniversary, and was expressed by international unions like the women's committees of the International Trade Union Confederation (ITUC) and the European Trade Union Confederation (ETUC), as well as many national and sector-specific unions.

Women's groups

The Novamed strikers received strong support from women's groups in Turkey in the wake of 8 March 2007. Petrol-İş organised the strikers' celebration of the International Women's Day in both Antalya and Istanbul, and this became the occasion on which many women and women's groups learned about the strike and met with some of the women strikers. While this sparked off isolated initiatives like Filmmor Women's Cooperative making a documentary film on the Novamed strike, it took until the end of the summer for a group of women in Istanbul to take more comprehensive action in support of them. Having learned that ICEM would send a Women's Committee delegation to Antalya in connection with the one-year strike anniversary, they decided that they should also contribute by establishing a Women's Platform for Solidarity with Novamed Strikers (Interview No. 12). The group in question mobilised support for this idea, and the platform was established with the participation of 29 feminist groups and women representatives of unions, professional organisations and political parties.

The aim of the platform was to make the women strikers visible and put pressure on Novamed to sign a collective agreement. Within a few weeks, they prepared posters and leaflets, initiated email- and fax-based support and protest campaigns, opened stalls in busy Istanbul streets in order to provide information to people and collect signatures to be submitted to the parliament, organised demonstrations in front of FMC's offices in Istanbul, collected money for the strikers, established a press commission to get media attention, and circulated information about the strike through domestic and international networks (Interview No. 12). Inspired by these activities, similar platforms and actions were initiated in several other cities. On the day of the first anniversary of the strike, women from across Turkey travelled to Antalya in a show of solidarity with the strikers. Afterwards, the women's groups initiated a second round of actions, which included also the establishment of a website (<http://www.novamedayanismagrubu.org>) and the organisation of a photo exhibition on wheels.⁵

Assessing solidarity in the Novamed struggle

When considering the role played by solidarity in the Novamed struggle, it should initially be pointed out that it made a difference also prior to the strike. In fact, it can be argued that the struggle would perhaps not have reached the strike stage had it not been for the solidarity practiced at the earlier organising stage. In this connection, it is worth reminding that Petrol-İş established contact with IG BCE,

EMCEF and ICEM even before it began to recruit Novamed workers. Later, when the organising efforts were met with alleged opposition and anti-union campaigns on the part of Novamed, there is much to indicate that the worst excesses of those campaigns were disciplined as a result of actions taken by unions outside of Turkey – this, in the sense that things got periodically better after the external unions had raised the problems with FMC in Germany. If it was not for the close cooperation established between Petrol-İş and the external unions, then the organising efforts would possibly have been undermined at an early point.

Turning to the strike itself, it is clear that the support and solidarity outlined in the previous section contributed positively to the morale and resilience on the part of the strikers. While the mutual support and solidarity among the strikers and in relation to their families prevented everyday doubts from gaining control of them, the support from further afield and the overall publicity that the strike received – including, it can be noted, through coverage in mainstream national newspapers – regularly reminded them that they were not alone in their struggle, that many other people cared for them, and that their struggle was of great importance not merely for themselves, but also for many other people located in Turkey and abroad. This gave the strikers a sense of being engaged in a struggle on the part of the many, and they wanted to prove to both themselves and others that they were capable of living up to the responsibility that it implied.

Shifting focus towards the end of the strike, there is little doubt that the support and solidarity outlined in the previous section contributed positively also to a collective agreement being concluded in mid December 2007. While the local Novamed management seems to have been minimally affected in any direct sense by the show of support for the workers on strike, the situation turned out to be different for the FMC management in Germany. No matter how much they might have wished for the conflict to be dealt with at the local level, both the general publicity created around the strike and the direct actions taken by non-local actors kept forcing it onto them. Based on what seems to have been a fear of the Novamed strike impacting negatively on its global image, the FMC management accepted that it had to get more directly engaged in resolving the conflict (Interview No. 11; Interview No. 13). Following a meeting with representatives of IG BCE, EMCEF and ICEM in late September 2007, the way was paved for a re-initiation of local negotiations, which led to an agreement being concluded within a relatively short period.

Although effective to a large extent, the support and solidarity related to the Novamed struggle was also somewhat underdeveloped. First, while the solidarity among the strikers was strong, most workers were not organised, and quite a few organised workers did not join the strike. Second, while the strikers received strong support from their own union, Türk-İş, other unions affiliated with Türk-İş, and the local branches and women representatives of DİSK and KESK, yet other confederations remained passive in relation to the Novamed strike. Furthermore, union support almost exclusively involved official representatives rather than ordinary members. Third, while the strikers received support from the local branches and women representatives of centre-left and more left-wing political parties, as well

as from local municipalities controlled by one of them, central party apparatuses and political institutions located in Ankara did not get involved in the Novamed struggle. Fourth, while the strikers received strong support from external unions organising workers within the same sector, more comprehensive union support from outside of Turkey was limited to the women branches of ITUC, ETUC and national unions affiliated with them. Lastly, while the strikers received strong support from the women branches of various unions around the world, the support from external women's groups was more limited.

Rather than being automatic, solidarity must be actively brought into action in particular instances. In the Novamed case, union support was for the main part mobilised through institutionalised channels of solidarity. While such channels are both quick and efficient, a possible drawback is that one can easily get stuck inside of particular institutional relations. With respect to women's groups, solidarity was mobilised more spontaneously and through a much less formal network of relationships. In connection with this mobilisation, a key point to note is the enabling role played by the strike being conceptualised as a 'women's strike' through a dialogical process involving union officials in *Petrol-İş* and ICEM around New Year 2007. While a union feminist in *Petrol-İş Kadın* played a key role in activating the women's network in Istanbul, there is much to indicate that particular individuals and their personal networks played important roles also more generally. For instance, both friendships across unions in Turkey, and the nationalities of union representatives outside of Turkey seem to have made a positive difference with regard to inter-union solidarity. Furthermore, the personal networks of a few individuals played central roles in mobilising local support for the workers.

Overall, it is clear that the support for the Novamed workers did not add up to a unified and coordinated solidarity campaign. While there certainly was coordination among some local supporters, among unions inside and outside of Turkey, and among women's groups in Turkey, the totality of solidarity practices is best characterised as parallel rather than joint. This was the case not least with respect to the highly coordinated activities of *Petrol-İş* and the external unions with which it was affiliated on the one hand, and the less coordinated activities of city-based women's platforms on the other hand. Considering the overall lack of coordination, the question can be raised if this had an impact on the effectiveness of the solidarity practices. While one can imagine that closer cooperation and coordination could have improved the effectiveness, it is also plausible that attempts at closer coordination could have undermined the overall support for the Novamed strikers – this, because the limited coordination enabled different people to express support on bases that others would not necessarily agree with.

With regard to the solidarity that was practiced in the Novamed case, the question can also be raised as to what extent it is possible and makes sense to rank them in terms of relative importance. For instance, was the solidarity practiced across borders more important than the one provided locally, or was the solidarity on the part of unions more important than the support provided by women's groups? Needless to say, there is no easy way to measure this. While it is possible to identify certain direct connections between a particular solidarity practice and a particular

outcome – for instance, the first anniversary visits on the part of women's groups in relation to the strikers' determination to keep the strike going, or the meeting between external unions and the FMC management in late September 2007 in relation to the re-initiation of collective agreement negotiations – it cannot be concluded from this that the solidarity practices in question were more important than others. Rather, we would emphasise how solidarity across levels and on the part of various actors mutually reinforced each other.

Although it was the combined solidarity across levels, borders and social groups that made the difference in the Novamed case, it is important to stress that this positive difference was not independent of characteristics related to the workplace as such. More specifically, the case at hand seems to confirm the view that 'collective agreements may be more likely to be wrung out of multinational enterprises, fearing consumer reaction to the glare of bad publicity generated by international campaigns' (ICFTU, 2004: 13). In this connection, it should be emphasised both that FMC has since long prided itself and been prided by others for being a socially responsible company – with, for instance, the Ethisphere Institute declaring it the world's most ethical healthcare company in 2008 (<http://ethisphere.com/wme2008>) – and that the negative publicity campaigns related to Novamed proved very successful in FMC increasingly being portrayed on the world wide web and beyond as a company engaged in super-exploitation of women workers in Turkey. As mentioned earlier, this seems to have had a significant impact on the FMC management wishing to get the industrial conflict resolved in the autumn of 2007.

Solidarity beyond the 'victory'

While the campaign to organise and obtain a collective agreement at Novamed proved successful in many respects, the victory remains quite shaky. One lesson that can be drawn from successful solidarity campaigns in the past is that 'victories can turn into defeats' (Armsbruster-Sandoval, 2003: 570). In the Novamed case, the union's position at the workplace is weak in membership terms, and it is fully possible that the number of organised workers will be below the 50 per cent required for the union to retain its legal competence to represent the workers when the current collective agreement expires in December 2010. An important reason for this is the extensive fear among workers of what the management might do to them if they join the union. Against this background and a certain drop in union membership, it has been emphasised that 'the struggle is not over at Novamed', and that the workers are in need of further support and solidarity (Korkut, 2008).

With respect to external unions, support will undoubtedly be forthcoming in the case that the Novamed workers and their union are subjected to treatment of the kind that prevailed earlier (Interview No. 10; Interview No. 11; Interview No. 13). However, if Petrol-İş loses its certificate and its membership base at Novamed dwindles further, then little will remain in the form of an institutional basis for external unions to get involved in support of Novamed workers. In this connection, it is important to keep in mind that Turkey is a country in which labour is very weak in relation to both capital and the state, and where 'private sector workers suffer

brutal anti-union harassment, including dismissals, while strikers face police violence and arrests' (ITUC, 2008). Although the legal framework protects most core labour rights, it is poorly enforced in practice, and the penalties for law-breaking corporations are much too soft to have a deterrence effect. Given this situation, the question can be raised as to what the external unions can do to support the workers at Novamed.

One option can be for them to put pressure on FMC to ensure that the Novamed management operates in accordance with both the labour law in Turkey – including, not least, the right of workers to organise with the union of their choice – and the 'highest standard of ethics' that FMC claims adherence to in its Compliance Program (<http://www.fmc-ag.com>). Given the weakness of its *Code of Business Conduct* (FMC, 2007), however, external unions can also put pressure on FMC to revise its code to include explicit reference to basic workers' rights. Another option could be for ICEM to negotiate a Global Framework Agreement (GFA) with FMC, which is something Petrol-İş requested IG BCE to consider in August 2008 (Document No. 7). While the weaknesses of GFAs are well known (Stevies and Boswell, 2007), such an agreement could nonetheless contribute to reduce the insecurity felt by Novamed workers when being or considering becoming organised (Wills, 2002). Yet another option could be for external unions to promote and contribute to the establishment of a cross-border union network within FMC that can coordinate activities and take on the company more collectively – this, either related to or independently of the Fresenius SE Works Council (FWC). Again, inclusion in such a network can contribute to reduce the insecurity felt by Novamed workers when being or considering to become organised.

Unfortunately, the prospects for deeper and more proactive solidarity support on the part of external unions are not particularly promising. With respect to IG BCE, international labour solidarity is clearly secondary to its pursuit of social partnership and dialogue in Germany (Dribbush and Schulten, 2008), and it has no intention neither to push FMC to revise its code of conduct or sign a GFA, nor to take an initiative to the development of a union network within FMC (Interview No. 10). Both IG BCE and ICEM have a strong sense of FMC not being interested in signing a GFA (Interview No. 10; Interview No. 13; Document No. 8), and their current strategic outlook rules out a more adversarial campaign aimed at pushing FMC to negotiate and sign such an agreement. Moreover, the external unions in question consider there to be no basis for the establishment of a union network within FMC – this, partly because there has been no broader demand for it, and partly because a network already exists in the form of the FWC in Europe (Interview No. 10; Interview No. 13). In the latter connection, it can also be noted that external unions have no intention to push for Turkey to be included in the FWC (Document No. 9; Document No. 10). Due in part to the influence of IG BCE, both EMCEF and ICEM have for the main part adopted its 'social-liberal' position, and there is much to indicate that ICEM has largely abandoned its earlier strategy of countering the power of global capital (ICEM, 1996) in favour of a more accommodating strategy consisting of partnership and dialogue with TNCs and governments (Routledge and Cumbers, 2009: 139–72).

Turning to solidarity on the part of women's groups, it is important at the outset to be clear about the exact basis on which they were mobilised in 2007 – namely, the location of women within patriarchal relations of power at Novamed. In other words, they mobilised in support of the workers primarily within the context of their broader struggle against patriarchy. In the Novamed case, this struggle went parallel to that of Petrol-İş, which took a clear stance in defence of their rights as workers *and* women – this, even if the issues specific to workers-as-women were initially treated in a somewhat secondary fashion (Interview No. 14). However, with the alleged practices aimed directly at controlling the bodies of women workers gone, there is currently less of a basis for women's groups to involve themselves in relation to the Novamed workers. Given this situation, the question can be raised as to what it is likely to take for women's groups to remain supportive.

One possibility would be that overt patriarchal practices are (re)introduced at Novamed, and that women's groups will mobilise on the same basis as they did before. However, given the public outrage previously caused by such practices, there is little to indicate that this will happen any time soon. Another possibility would be that the women workers at Novamed develop a feminist consciousness and join the broader social struggle against patriarchy, in which case women's groups could get engaged in solidarity based on 'feminist sisterhood'. However, there is little to indicate that the women workers at Novamed ever conceived of themselves as being subjected to male dominance during the industrial conflict and the contact between them and women's groups was largely discontinued after the strike. Although the Antalya Women's Counselling and Solidarity Centre co-organised a training session on 'women's body rights and reproductive health' for Novamed women workers in March 2009, it is too early to say if this will result in closer contact between them and local women's groups (Kaplan, 2009).

A third possibility would be that the relationship between Petrol-İş and women's groups develop to such an extent that they unite in a common struggle against the oppression of both workers and women. In this case, women's group support for Novamed workers *as* workers would go hand-in-hand with reciprocal Petrol-İş support in the broader struggle against patriarchy. In this connection, although Petrol-İş has become increasingly committed to organising women workers and improving their working conditions, this has yet to be understood in anti-patriarchal terms. While arguing that the 'patriarchal mentality' in Turkey constitutes an obstacle to organising – this, because 'not only the decision to work, but also the decision to become a union member, is not made by women on their own' (Petrol-İş, 2008: 29) – it contributed to reproduce it in the Novamed case. Furthermore, Petrol-İş is no less immune than most unions in Turkey to the charge that they are patriarchal institutions (Toksöz, 2002). Irrespective of it being the only union with a women's magazine in Turkey, Petrol-İş has yet to establish a women's committee or develop a clear policy related to women workers and their rights, and is completely male dominated at the top of its organisation. That said, it should in fairness be mentioned that Petrol-İş has established a separate budget for women that it launched a gender training programme in early 2009, and that women's committees have been established in a few branches.

It should also be noted that although Petrol-İş has come to see itself as being engaged in a broader struggle involving other social groups – with participation in the Turkish and European Social Forums, and its Administrative Board stressing that ‘[t]he new union understanding [implies] strategic cooperation with social movements in the fight against different forms of suppression’ (Petrol-İş, 2008: 4) – such social movement unionism has yet to be translated into practice in Turkey. While the ‘cooperation [with] the women’s liberation movement’ in the Novamed struggle is treated as an example of what is needed, the post-strike contact between Petrol-İş and this movement has been limited to a conference on ‘women labour confronting neo-liberal transformations’ being organised in its Istanbul facilities in April 2008, and Petrol-İş facilitating the previously mentioned training of Novamed women workers in March 2009. Against this background, it is currently much too early to say if a coalition of sorts will develop between Petrol-İş and women’s groups.⁶

Concluding remarks

The present story of the women workers’ strike in Turkey’s Antalya Free Zone shows that solidarity can make a positive difference of great significance. Without the support of many people – including, not least, women’s groups and unions outside of Turkey – the outcome of the industrial conflict would likely have been much worse for the Novamed workers. That said, the case at hand also points to some significant challenges or limits related to solidarity across borders and social groups. While Petrol-İş has developed a quite internationalist understanding of the labour struggle, it is clear that some other unions remain much more caught up in national affairs or partnerships with employers and the state which, in turn, can place severe limits also on the strategies pursued by global union federations. Furthermore, although Petrol-İş has increasingly come to see itself engaged in a broader struggle involving also other social forces, much remains to be done both internally and externally if this is to develop into meaningful social movement unionism.

Interviews

Interview No. 1: Ex-worker, Novamed; Antalya, 8 May 2008.

Interview No. 2: General Manager, Operational Manager, and Chief Financial Officer, Novamed; Antalya, 7 April 2010.

Interview No. 3: Worker, Novamed; Antalya, 10 May 2008.

Interview No. 4: Chief Financial Officer, Novamed; Antalya, 24 November 2008.

Interview No. 5: Lawyer, Petrol-İş; Istanbul, 8 February 2008.

Interview No. 6: Group of workers, Novamed; Antalya, 10 May 2008.

Interview No. 7: Journalist; Antalya, 19 November 2008.

Interview No. 8: President, Antalya Branch of the Chamber of Electrical Engineers; Antalya, 20 November 2008.

Interview No. 9: Union official, Petrol-İş; Antalya, 19 November 2008.

Interview No. 10: Head of International Department, IG BCE; telephone interview, 6 July 2009.

Interview No. 11: General Secretary, EMCEF; telephone interview, 7 September 2009.

Interview No. 12: Women activist and co-initiator of the Women's Platform for Solidarity with Novamed Strikers; Istanbul, 11 October 2008.

Interview No. 13: General Secretary, ICEM; telephone interview, 21 August 2009.

Interview No. 14: Editor, *Petrol-İş Kadın*; Istanbul, 10 October 2007.

Documents

Document No. 1: Second Antalya Labour Court; E: 2005/947, K: 2005/486 (08/12/2005).

Document No. 2: High Supreme Court, Ninth Judicial Office; E: 2006:/2004, K: 2006/2600 (06/02/2006).

Document No. 3: MLSS Antalya Regional Directorate, Formal Arbiter's Report; No.: B.13.0.ÇGM.1.03.07. (TİS.1507).76527.140.09/14788 (21/07/2006).

Document No. 4: Labour Inspectorate, Minutes of Strike Ballot; Case No.: 76527.07.01, SSN: 2.3910.011053290.07.01 (25/08/2006).

Document No. 5: First Antalya Labour Court; E: 2007/123, K: 2007/775 (16/08/2007).

Document No. 6: The Collective Agreement Signed by Novamed GmbH and Türkiye Petrol, Kimya, Lastik İşçileri Sendikası (Petrol-İş) valid from the date 01.01.2008 to the date 31.12.2010 (18/12/2007).

Document No. 7: Email from union official in Petrol-İş's International Department to authors (31/12/2008).

Document No. 8: Email from Head of IG BCE's International Department to authors (08/08/2009).

Document No. 9: Email from EMCEF union official to authors (06/07/2009).

Document No. 10: Email from union official in FEMCA-CISL's International Department to authors (10/09/2009).

Notes

- 1 The analysis is based on a large number of semi-structured interviews with Novamed workers, the Novamed management, civil society actors in Antalya, women activists and union representatives, as well as media accounts and relevant documents – some of which re-printed in *Petrol-İş* (2008).
- 2 These allegations were rejected by the Novamed management at the time of the conflict (*Petrol-İş*, 2008:53), and have more recently been denounced as 'completely false accusations' (Interview No. 2).
- 3 The Novamed management has also denounced these allegations as 'completely false accusations' (Interview No. 2).
- 4 These claims were rejected by the Antalya Labour Court on 16 August 2007 (Document No. 5), and *Petrol-İş* withdrew its appeal of the decision when the industrial conflict was approaching a resolution (Interview No. 5).
- 5 For more details about the mobilisation and activities of women's groups, see Kurtoğlu and Fougner (2008).
- 6 For a much more in-depth discussion on some of the issues dealt with in this section, see Fougner and Kurtoğlu (forthcoming).

9 Cross-border wage struggles in the global garment industry

The campaign for an Asia floor wage

Jeroen Merk

Introduction

The global garment industry is renowned for low wages, excessive overtime and poor working conditions. There is much evidence that wages in the garment industry are structurally failing to meet the basic needs of workers (USDOL, 2000). In many cases the legal minimum wages set for workers in the apparel industry fails to provide enough income to maintain a family of four above the nationally defined poverty level. In some countries, Bangladesh for example, the monthly minimum wage of 1662 Taka (16.60 Euros) is even less than the UN absolute poverty thresholds of one US dollar a day.

Labour rights advocates have long argued that any definition of decent working conditions should include some kind of wage standard because wages are essential to the workers' well being. The bottom-line is fairly simple: every worker in the garment industry should make enough money to live. Insufficient wages imply that individuals, families and communities who depend upon wage labour for their well-being cannot lead a dignified life (Castree *et al.*, 2004: 244). This means that wages at a very minimum need to provide for basic needs (housing, energy, nutrition, clothing, health care, education, potable water, child care, transportation, and savings), include additional discretionary income, and take into consideration a number of dependants.

While trade union and anti-sweatshop campaigns have brought the living wage (LW) issue to the table, little progress has been made with actually implementing a LW. In fact, the spatial fragmentation of production in the garment industry has undermined traditional strategies of labour to protect itself against exploitation, turning the global supply chain into a barrier both for organising and collective bargaining. That is, the nature of the subcontracting system itself negatively influences the capacity of workers to organise and protect their own rights. In the face of these challenges, many have argued that workers should upscale their strategies to confront the transnational nature of capital.

In this chapter, we discuss the Asian Floor Wage (AFW) campaign, which is a grassroots attempt to raise wages collectively throughout Asia, thereby seeking to counter the threat of capital relocation. The AFW Campaign is a proposal to put a floor under current wages and to prevent wage competition between garment

exporting countries. In section one we start with outlining three basic reasons why poor working conditions and poverty wages have become widespread in the global garment industry. Section two discusses counter-strategies and is dedicated in particular to discussing the AFW campaign. Here we will carefully explain in six separate steps how the AFW alliance defines, calculates and agrees upon a common wage demand.

The structural conditions behind poverty wages

In this section, we will shortly point to three reasons why it is so difficult to improve working conditions, including wages, in the global garment industry. The first concerns the difficulties workers face in organising themselves vis-à-vis their employers; the second concerns the relocation threat of capital which grants corporations much leverage vis-à-vis labour and governments. The third concerns macro-economic trends (deflation) and micro-economic trends (sourcing practises) that further question the sustainability of an export-oriented development strategy. These miscellaneous dimensions constitute a real challenge to labour advocates around the world. They represent the ‘contextual constraints’ that workers and their allies face as they struggle for solutions.

Barriers to organisation

The best way to counter poor working conditions, protect basic human rights and decency and *improve wages* is by empowering workers through organisation. Freedom of association and collective bargaining are often seen as enabling rights, for example, they represent the ‘key institutional mechanisms to empower workers and thus mitigate power asymmetries’ (Rodriquez-Garavito, 2005: 205). Yet, the way garment production is fragmented among many production sites and countries makes it extremely difficult to achieve collective organisation. Global sourcing companies spread production over dozens of countries and (often) hundreds of suppliers. This divide-and-rule strategy reduces labour’s bargaining power and makes it possible to exploit the locational rigidity of workforces. And while differences between workers on the basis of skill, gender, ethnicity, or position (i.e. ‘core’ workers versus ‘peripheral’ workers) have always posed problems for collective action efforts, the spatial decentralisation of production further intensifies these differences but also adds new problems, for example, related to distance, language, tradition or nationality.

Of course, barriers to organising cannot be reduced to the fragmented nature of garment production. There are many other important reasons. The repression of political rights and trade unions in important production countries undermines workers’ capacity to organise freely, while in other countries, unionisation is either banned in export processing zones or made nearly impossible through legal limitations and restrictions on union recognition. On a factory level, employer discrimination against union members or workers suspected of engaging in organising activity makes organising extremely difficult. Over the years, thousands of workers have

been fired for joining unions, which in turn sends a strong discouraging message to non-unionised workers. Workers themselves often lack resources to engage in organising efforts. For example, the mostly women employees who work long hours in factories and then have to go home to assume their household responsibilities involving reproductive and domestic care might simply lack time to become involved in trade union activity. Finally, the precarious nature of employment means that workers are never certain that their contracts will be renewed. In addition to workers with irregular contracts, many have no contract at all. They work in non-registered workplaces and are often home-based. Without a legal employment relationship, these workers face even more obstacles in organising, while their informal status makes it difficult if not impossible to apply national labour legislation that requires employers to recognise and bargain with labour organisations.

The cumulative effect of these factors comprises the first set of reasons why it is difficult to achieve wage gains through organisation. The many difficulties workers face in organising further widens the gap between the scale of global production chains and local and national worker organisations, while the growing disparity of power between unions and international (*de facto*) employers cannot be analysed without taking into account the relocation threat.

Relocation threat

Even though barriers to organisation often seem *local* in nature, we must analyse these barriers in the context of global production. The emergence of the global supply chain has altered the balance of power between employers and unions and weakened traditional regulatory mechanisms associated with the state. International outsourcing has detached corporations from the specific communities and specific labour pools associated with them (cf. Lichtenstein, 2006: xiv). In this context, workers are increasingly treated as a 'subcontracted component' rather than a fixture as part of employer organisations. This offers corporations the option of picking and choosing a favourable location, often referred to as 'regime shopping' or the 'race to the bottom'. As a continued threat, the possibility of relocation increasingly becomes anticipated by the actions that the workers and governments take as an aspect of the discourse of what will happen to 'industry', 'exports' or 'employment' if they do not adjust to the imperatives of global competitiveness (De Angelis, 2007: 124).

Deflation, overproduction and global sourcing practices

Finally, substandard wages are also determined by both macro-economic and micro-economic dynamics which make it difficult to achieve structural improvements for workers and their organisations. Given that most non-labour production costs are stable and more or less equal among the various industrialising countries, the flexible costs (i.e. labour) will remain under a downward pressure (Kearney, 1999: 207). This gloomy prospect is further intensified by the increasing excess of production capacity. As a result, world prices for industrial (especially standardised)

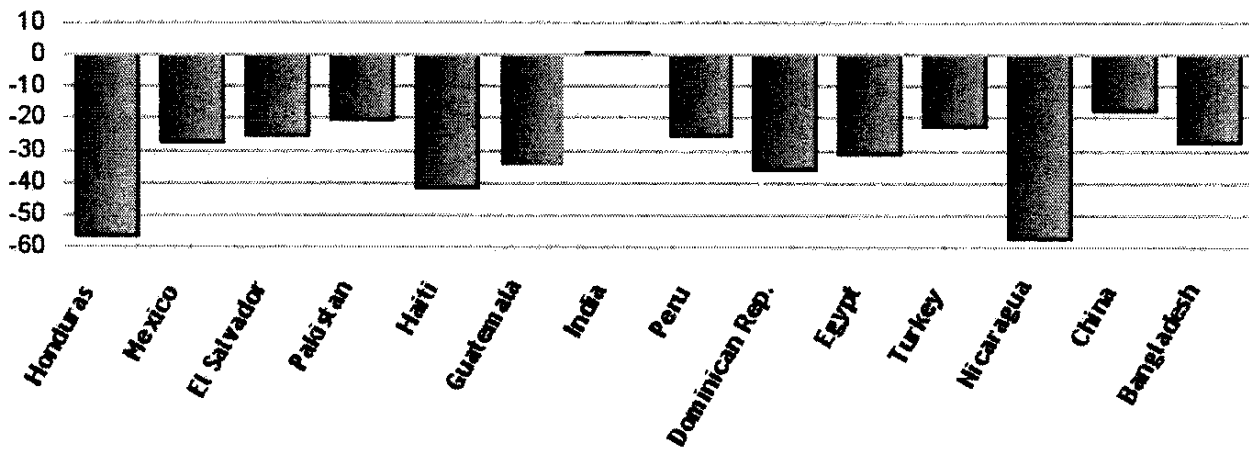


Figure 9.1 Change in the factory price of cotton knit shirts, 1994–2004.

Source: Workers' Rights Consortium

goods in many countries have come under serious price pressure, which is similar to the trend in agricultural commodities a few decades earlier. Figure 9.1 shows that the factory price of cotton knit shirts for most garment export countries dropped significantly between 1994 and 2004. Under such price pressure – and little space for improving productivity – it will be difficult to increase wages even if trade unions have some leverage over their direct employers.

Low-cost sourcing has been pursued most radically by large retailers like Walmart and Aldi that have done rather well with the implementation of these practises. In 1993, there was not a single retail firm on the list of the world's top 100 transnational corporations (TNCs); one decade later, however, the list included 14 companies (Wrigley *et al.*, 2005: 428). The world's largest multi-product retailer, Walmart, plays a particularly important role because its strategy is based on 'always low pricing' which is achieved through an 'Every Day Low Pricing' strategy based on Rollbacks and 'Every Day Low Cost'. Their enormous size affords them a tremendous amount of purchasing power over suppliers which they apply toward low-cost sourcing. This in turn allows them to drive prices down at the retail level – by offering jeans for four dollars, and so on – and this, in turn, allows them to win market share from competitors, who are forced to pursue a similar low-cost sourcing strategy (or get out of business). While this sourcing model grants buyers a lot of flexibility, it leaves suppliers with little or no incentive to invest in their workforce, to increase productivity, or change their 'sweatshop' business strategies that are predicated on poor working conditions and hunger wages (Braun and Gearhart, 2005: 217).

Counter-strategies across national frontiers

So far, we have presented the parameters of why the garment industry is characterised by low levels of unionisation and a near absence of collective bargaining, which in turn has resulted in poverty wages. But even if workers succeed in organising themselves and want to enter into collective bargaining, they discover that they are bargaining with the wrong people, namely local capital itself subordinated

to the dynamics of global capitalism. We have not looked at how the socially disruptive practices of neo-liberalism have evoked a counter-reaction from a broad global movement of labour advocates, activists, consumers, and workers themselves, which has led not only to mass protests against the WTO, IMF and World Bank, but has also stimulated the global anti-sweatshop campaign(s) that targets large corporations like those that dominate the garment industries. These countervailing tendencies have turned the garment industry into a terrain of sector-specific social and ideological conflicts.

The last 15 years have seen numerous of such grassroots social struggles in which workers successfully mobilised allies overseas to support them in their struggles. Workers mobilise extra-local actors in an attempt to shift the power-balance at the workplace. They 'jump scale' and 'bridge space' to gain leverage over employers, local authorities and in some cases, even governments (Merk, 2009: 606). These struggles have contributed to widespread attention and a growing awareness of sweatshop problems in the global economy. It has turned brands into sites of political, cultural and ideological struggles. Millions of consumers have been reached through anti-sweatshop campaigns over the years. Many of them have actively participated in these campaigns by putting pressure on brands and retailers turning consumer power into a 'resource and an opportunity for pro-worker struggles' (Castree *et al.*, 2004: 221).

On the positive side, a growing group of global sourcing corporations – that is, brands and retailers – have now publicly endorsed ethical standards, including the core International Labour Organization (ILO) conventions. Some studies and observers indicate that monitoring the activities of sourcing companies has resulted in increased compliance with outcome standards such as health and safety and the length of a workday, as Stephanie Barrientos and Sally Smith point out (2007). At the same time, they note that very little progress has been made with regard to process rights – freedom of association and collective bargaining – which would empower workers to struggle for changes in production systems themselves (Barrientos and Smith, 2007). Moreover, limited progress, if any, has been made to reverse the flexibilisation of labour or to strengthen or reform national labour laws. In a review of developments in the US anti-sweatshop movement, Jill Esbenshade argues that 'victories have been few and often ephemeral', even if the 'anti-sweatshop movement has increased its ability to challenge apparel corporations to not just improve the conditions in individual factories, which are hard to sustain, but also to address the underlying structures that will continue to reproduce those conditions in factory after factory' (2008: 467). Furthermore, despite many LW campaigns, wages have not improved in the garment industry and, as Peter Utting from the United Nations Research Institute for Social Development (UNRISD) argues, 'perhaps the weakest aspect of both [corporate social responsibility] CSR discourse and practice relates to redistribution' (2007: 707).

Despite progress in some areas, we can therefore conclude that the systemic problems driving substandard working conditions in the garment industry have yet not been successfully addressed through anti-sweatshop campaigns. 'Laudable as this work has been', the AFW alliance writes in a declaration, 'it has little ability to

provide leverage for building worker collectivity with bargaining power. Workers collectivities with bargaining strength need measurable and negotiable demands appropriate to the economics and the power holders of the industry' (AFW, 2007). So, bargaining power has to come from the framing of a demand that is negotiable and deliverable and appropriately targeted given the structure and economics of the industry as a whole (AFW, 2007). In the remaining part of this chapter we will discuss the AFW campaign, which represents not only a grass-roots attempt to scale up wage struggles but also seeks to develop tactics at a variety of geographical scales.

Formulating, defining and calculating a cross-border wage demand

The idea of an AFW originates from meetings at the World Social Forum in Mumbai, in 2004 (Bhattacharjee *et al.*, 2009). At this meeting, labour and non-government organisation (NGO) organisers recognised that the power of global sourcing companies – i.e. Western TNCs – places severe limits on the ability of workers to improve wages and working conditions in the global south (*ibid.*).¹ In the light of these difficulties, the AFW campaign represents an attempt to denationalise wage bargaining and opt for region-wide organising by which it seeks to address capital's strategy of pitting workers against workers, countries against countries. Ashim Roy, Secretary General of the Indian-based New Trade Union Initiative, puts it as follows: 'The AFW is an industrial level collective bargaining strategy, targeting the garment global supply chain and combating the threat of relocation'. In 2007, the First International Planning Meeting was held in South Asia. At this meeting the international participants came to an agreement on the goals, overall direction, content, structure, and timeline for an AFW campaign. The goal is to win AFW through negotiations between employers in the industry and workers' representative organisations, with the mediation and support of governments, inter-governmental organisation and social movement organisations. Instead of competing against each other to drive wages further down, we have formulated a unified, regional demand, with a global echo, for a wage which is decent and fair. As we discuss below, the AFW is different in each country, but has the power to buy the same set of goods and services in all countries. For 2009, the Alliance has calculated a floor wage of 475 PPP\$ (purchasing power parity in US\$).

The Alliance 'acknowledges the importance of the Global South led by unions in this international campaign' (AFW June 2007). An International Steering Committee has been formed with representatives from South Asia, Southeast Asia, East Asia, Europe, and the US. Representatives from Asia have a majority vote of 75 per cent, while Europe and the US together represent 25 per cent of the vote. The International Secretariat is located in Delhi, India. At a country level, national campaign coalitions have been formed. In India, Indonesia, and Sri Lanka important garment unions collaborate together with labour NGOs. In other countries, the national coalitions are still in a more formative phase, but here too, working committees have been set up to coordinate national activities – including the organisation on workshops, setting up research and planning campaign activities. In China, the Alliance works with labour NGOs that operate in Southern China

and is developing ties with academics to stimulate discussion and research on the topic of a LW in China's export factories. Committee for Asian Women (CAW), a regional network of 46 women workers member groups in multiple Asian countries which aims to empower women workers is also active in the campaign. Outside Asia, the European-based Clean Clothes Campaign and ActionAid UK are actively involved in the campaign. In the US Jobs with Justice is the lead organisation. These organisations will organise campaigns to put pressure upon Global Buyers like Walmart, Carrefour, Tesco and Aldi. Attempts are also undertaken to involve retail and transport unions to explore possibilities for global supply chain organising. What began as an Asia-based process has now grown into an international alliance comprising over 70 trade unions, labour and human rights organisations, development NGOs, women's rights groups, and academics in 17 countries across Asia, Europe and North America.² The public launch of the campaign took place on October 7, 2009.

LW campaigns are not new. They go back to the early phases of industrialisation in both Europe and the US. More recently, anti-sweatshop campaigns in both Northern and Southern countries have raised the demand of a LW for garment workers in global campaigns. Despite some debate within multi-stakeholder initiatives like the Ethical Trading Initiative, the majority of brand-named and retail companies have refused to adopt a LW in their codes of conduct. Some companies argue that only 'markets' set wages, others claim technical difficulties in defining and calculating a LW. Tesco for example argues that the 'lack of a commonly-understood definition means we don't find it practicable to use the term in day-to-day work' (cited in LBL, 2008: 47).

While these technical difficulties are often exaggerated and used as a pretext for non-action, developing a cross-border wage demand is of course not without difficulties. First of all, to be credible the wage demand should be developed, defined and supported by local trade unions and labour activists. It should certainly not be a demand imposed by Northern activists in which Southern workers cannot recognise themselves. Instead, it requires finding a way of mediating between place-based wage demands and the formulation of a cross-border wage demand. In other words, the challenge is to bring unity to wage demands, to define commonalities within the differences, and to provide a campaign strategy in which Asian garment workers can unite. In more abstract terms, it attempts to bring together 'multiple particular interests into some framework expressive of general interest' in order to confront the 'systemic qualities of the damage being wrought across geographical scales and differences' (Harvey, 2000: 80–81). In the remaining part of this chapter we will discuss how the AFW campaign takes up this challenge and discuss in six steps how the AFW is defined, formulated and calculated.

Step 1. Define a formula for the AFW

The first step is to develop and adopt a definition of an AFW based on a concept of a LW. Like any other LW definition, this requires addressing the three questions: (i) how to define 'basic needs'; (ii) the number of dependents to be covered; and,

(iii) the length of the working day/week involved. What amount of food, non-food items, and discretionary income is 'adequate'? The AFW distinguishes between food costs and non-food costs. Food items to include in a 'food basket' of course vary according to the usual diet of each community. Common items in Asia include rice, wheat, pulses, meat, fish, milk, vegetables, water and fruit. What all food items have in common is that they can be measured in calories. This means that different food baskets can be represented by their calorific content (for example, a meal of 700 calories). So, instead of defining the various types and quantities of food items that are to comprise the food basket, the AFW alliance proposes a basket of items representing a particular nutritional threshold – and one that is based on a 'normal' working class diet, i.e. food items bought in street markets or local shops and prepared at home. Some garment producing countries do already use nutritional thresholds to define their legal minimum wages: Bangladesh has set its standard very low at 1,700 calories, even though this is insufficient to produce the human energy needed for the hard work carried out in garment production. Indonesia has set – with support of the ILO – the highest standard at 3,000 calories. The AFW alliance has agreed to a figure of 3,000 calories for the level of basic food required on a daily basis. Adopting such a nutritional threshold means that local groups can then define how their own basket is filled. This enables us to sidestep an important difficulty associated with other LW calculations – how to agree on the specific items and quantities to go in the food basket needed for a LW. At the same time, this nutritional threshold can be standardised across countries, and this is important for reaching a common AFW figure.

Besides food items, a LW should also cover important non-food items such as housing, clothes, healthcare including maternity care, childcare, education, fuel, transportation, savings, and so on. Like the food-basket, the bundle of non-food commodities varies across space and time. How much of the wage is spent on clothing, fuel and housing may differ according to the climate, or to the amount of non-wage subsidies provided by the state – on fuel or housing, for example. It also varies according to the habits and culture of the working class in each location, for instance relating to activities such as births, weddings, and funerals. So, it is difficult to come up with a universal basket of non-food goods and services to cover the needs of garment workers in different countries. But here too, we find a commonality: how much a worker spends on non-food items can actually be estimated as a certain percentage of how much is spent on food items. Garment workers from Indonesia, India, Bangladesh and elsewhere spend a great deal – often around half – of their income just on food items (ILO, 2008c). For example, in India the Ministry for Labour and Employment found that workers spend on average 47.8 per cent of their income on food items. In Thailand, food consumption is assumed to account for 60 per cent of total consumption at poverty lines.³ This means that non-food costs can be estimated by multiplying food costs by a non-food 'multiplier'. No price surveys are needed to account for expenditure on health, housing, education, transport, savings, and so on. Instead, the food consumption standard of 3,000 calories can be multiplied by a factor representing the extent to which food is related to overall living costs. As a principle, the ratio between the cost of

food and other basic needs is 1:1. This method is known as the '*extrapolated food basket approach*', and we will return to it in Step 4.

Should the AFW be calculated for the needs of just one worker or for his/her family too? LW definitions normally include the notion that wages should support more people than just the individual worker. Minimum wage regulations, by contrast, often do not. The AFW definition states that a wage earner should cover three 'consumption units' – that is two adults and two children. As a child consumes less than an adult, each is calculated as half an (adult) consumption unit. Thus, the ratio of earner to dependents is set at 1:3.

How many hours does a worker have to work in order to earn a LW? This question is crucially important for garment workers because the industry is notorious for long working weeks of up to 70–80 hours, with devastating consequences for workers' health and family lives. Excessive overtime is done not only because of pressure from employers. Workers often need to do it because they cannot meet their families' basic needs out of the wages they get from regular hours of work. This means that the struggle for a LW cannot be separated from the struggle to limit the length of the working day. Therefore, this wage must be earned during each country's legal maximum working week, though not above 48 hours, in line with ILO standards.

In sum:

- The cost of food is based on a standard calorific intake – 3,000 calories per (adult) consumption unit.
- The ratio between the cost of food and of other basic needs – such as clothing, housing and utilities, healthcare (including reproductive care), social security, education, and savings – is 1:1.
- A standard family size of 2 adults and 2 children = 3 consumption units.
- The wage is earned during each country's legal maximum working week, though not above 48 hours.

Step 2. Calculate floor wage in local currencies

Now that we have defined the various components on which an AFW should be based, we can use this definition to calculate *floor wage* levels for garment workers in different countries. This goes in four steps:

- a. Collect information on a daily food basket of 3,000 calories, in each country. This should be based on reasonable and average market costs. For example: in Bangladesh, a local labour NGO – *Karmojibi Nari* – took 11 main items that workers consume daily. In May 2008, this basket cost an individual worker 52.50 taka.
- b. Multiply this by three 'consumption units'. In the Bangladeshi example, this would be $52.50 \times 3 = 157.5$ taka.
- c. Multiply this by 30 days to arrive at a monthly cost. In the Bangladeshi example, this would be $157.5 \times 30 = 4,725$ taka.

- d. Finally, double it to cover non-food costs. In Bangladesh, this gives a floor wage of $4,725 \times 2 = 9,450$ taka.

Similar calculations in other Asian garment producing countries give the following national wage figures: India 7,695 rupees; Indonesia 23,35,200 rupiah; Sri Lanka 15,000 rupees. Now we can compare the difference between the legal minimum wage and the floor wage in each local currency (Table 9.1).

Food prices are always related to a particular time and place. As most people will have experienced, over time the price of food tends to go up. It is therefore necessary to repeat this calculation annually to account for inflation. Food prices can also vary significantly between different places *within* a country at the same moment. In Indonesia, a food basket of 3,000 calories costs more in Jakarta than in Central Java – both important garment producing regions. An AFW can be as easily calculated for different regions within a country as it can for different countries.

Step 3. Compare AFW figures across countries

Now we have defined the AFW, and collected information on the corresponding wage levels in several Asian countries. Since our aim is to formulate an AFW demand that will buy a similar basket of goods and services across Asian countries, we need to find a credible way to compare the results from the different country surveys. It is, after all, on the basis of this comparison that an AFW can be formulated (see Step 4). Since wage surveys take place in local currencies, we need to address two main problems.

We can only compare the different Asian wage levels by converting them into another currency, such as the euro or the US dollar. For example, the Bangladeshi floor wage of 9,450 taka converts into 108 euros (exchange rate March 2009), while 7,695 Indian rupees could be converted into 117 euros. The problem is that, for various reasons, the exchange rate between currencies can strongly fluctuate in a short period of time. This movement in exchange rates could have a distorting impact on our aim of setting an AFW. Another problem is that currencies can be overvalued or undervalued. This makes it difficult to use exchange rates between countries as a way of comparing wage levels.

Table 9.1 Minimum wages compared to AFW calculations (2008, in local currencies)

<i>Country</i>	<i>Legal minimum wage</i>	<i>Wage based on the AFW definition</i>
Bangladesh	1,662	9,450
China	687	1,158
India	4,238	7,695
Indonesia	9,72,604	23,35,200
Sri Lanka	6,750	15,000

Between countries, the price levels of goods and services vary. Each currency has a unique purchasing power. For example: 52 taka buys a Bangladeshi worker a 3,000 calorie meal on a street market (see Step 2). But when you convert this amount into euros – giving 59 cents – it is obvious that this would fail to buy a 3,000 calorie meal in any European market. Although the difference in price levels between Asian countries is generally much smaller, here too the amount of commodities that different currencies buy can vary significantly.

A meaningful comparison of the national wage surveys must therefore take into account the different costs of living and, thus, *equalise the spending power* of different currencies. A possible solution to these problems is provided by the notion of PPP. This is defined as: ‘the number of currency units required to purchase the amount of goods and services equivalent to what can be bought with one unit of the currency of the base country, for example the US dollar (ICP, 2006). In other words, PPP can be used to calculate how much money is needed by a person outside the USA to buy the same basket of goods that a person in the USA can buy. Table 9.3 shows that one US dollar has a similar buying power to 22.64 taka or 3.45 yuan, for example. Table 9.3 also shows what happens when we convert the national wage based on the AFW definition into US dollars, and how much this would be in PPP\$. For example: In India, US\$160.98 buys a basket of goods worth US\$524.2. It is on the basis of the second PPP figure (the final column of Table 9.2) that a common AFW is to be formulated.

Step 4. Decide on a level for the AFW

Now we have defined a floor wage formula – that is, based on a LW concept – calculated how much the monetary value is in local currencies, and discussed ways to compare these values between different Asian countries. The next step

Table 9.2 Steps 2 and 3: Calculate and compare AFW wage levels between different countries (2008)

Country	Step 2: Calculate AFW in local currencies			Step 3: Compare wage figures	
	Food basket for 3000 calories (one adult)	Three consumption (units/month)	Food cost + non-food costs (50% each) 9450	Converted into US\$	FC + NFC in PPP\$
Bangladesh	1,575	4,725	9,450	137.9	417.4
China	193	579	1,158	169.4	584.7
India	3,89,200	11,67,600	23,35,200	243.6	593.6
Indonesia	1,28,250	3,84,750	7,695	160.9	524.2
Sri Lanka	2,500	7,500	15,000	138.8	426.5

Source: AFW estimates

is to establish a common Asia wage figure, based on PPP\$, which can be used in campaigning, lobbying and negotiation. We start with comparing the information gathered in Step 3. If the calculation takes place on the basis of a LW formula (see step 1), one always ends up with a range of national wage figures. Here we found a range of monetary values ranging from 417.4 PPP\$ in Bangladesh to 593.6 PPP\$ in Indonesia (see Table 9.3). This means that a single wage figure necessarily falls within a spectrum of ideal wage demands in the different countries. There is no magic spell to decide which figure from this range should be taken as the AFW. *This can only be decided through a political process* of deliberation, discussion and consensus-building between the different national alliances. If the AFW Campaign decides on a wage level at the lower end, for example 425 PPP\$, then organisations from a number of countries may consider it too low to count as a LW. By contrast, opting for an AFW at the higher end, for example 575 PPP\$, may mean that some trade unions will consider it too high to use in real negotiations with employers or government officials. It is important to remember, however, that any wage figure within this band does represent a major step forward when compared to the legal minimum or prevailing wages in any of the participating countries.

At the Third International Planning Meeting in Hong Kong, the AFW Steering Committee decided to set the AFW for 2009 at 475 PPP\$. The participants discussed and debated this in depth, to reflect their countries' different economies and politics. This discussion was a culmination of debates within different countries and of wage survey data collected from various Asian countries. They agreed that this wage of 475 PPP\$ should be earned within a normal working week (but no longer than 48 hours) and should not include any payment for overtime and/or bonuses, incentives, allowances, skill premiums, and so forth. This process of setting a common pan-Asian wage demand needs to be repeated annually in order to adjust for inflation.

Food cost forms the core of AFW formulation because food costs in the Global South are significantly higher than in the Global North, and working class families tend to struggle most with this cost. Our method of calculating the AFW gives the various national alliances some space for negotiation on non-food items.

As discussed in Step 1, the ratio of Food Cost to Non-Food Costs within the AFW formulation has been defined to be an average of 1:1 or 50 per cent each. However,

Table 9.3 AFW at 475 PPP\$ converted into local currencies

Country	AFW (2009)	PPP\$ conversion	AFW in local currencies
Bangladesh	475 PPP	$\times 22.64 =$	10,754 taka
China	475 PPP	$\times 3.45 =$	1,63,875 yuan
India	475 PPP	$\times 14.67 =$	6,96,825 rupees
Indonesia	475 PPP	$\times 3934 =$	18,68,650 rupiah
Sri Lanka	475 PPP	$\times 35.17 =$	16,70,575 rupees

in order to account for different development standards in different countries, a variable of 10 per cent (plus or minus) has also been agreed within the Campaign. This means that different countries can then define this ratio according to their own development standards. There is a well-established empirical relationship between income and the proportion of expenditure on food. This relationship is known as Engel's Law (after the Belgium economist Ernst Engel). This law states that as people's income rises, they spend relatively less of the household's budget on food. This phenomenon is found within countries, where the working class spends a relatively larger proportion of their income on food compared to middle and upper classes. It is also found on a cross-country basis, where poor countries spend relatively much more of their GNP on food compared to wealthier countries. In the USA and many European countries, the proportion spent on food is around 20 per cent,⁴ while in many garment producing countries it is well over 50 per cent.

Step 5. Convert the AFW back into local currencies

Step 5 is a simple one: to convert the common Asia wage figure of US475 PPP\$ (for 2009) back into national wage figures. For example (see Table 9.3): In Bangladesh, the AFW of 475 PPP\$ represents 10,754 taka (475×22.64). In India, it represents a monetary value of 6968.25 rupees (475×14.67).

Now we have formulated both a regional (*Asian*) wage demand and differentiated (*national*) wage demands. The local wage figure provides a clear benchmark, one i.e. based on the provision of a LW to workers. It can be used to compare with minimum, prevailing, negotiated and best-practise wages as well as other possible LW calculations. The proposed 475PPP\$ is actually higher than recent LW proposals in Bangladesh, Indonesia, Sri-Lanka and India. In 2006 the Bangladeshi Institute for Labour Services calculated a LW of 4,800 taka, while in Sri Lanka a survey in 2005 conducted by ALaRM (Apparel-industry Labour Rights Movement) found that the minimum monthly salary of a garment worker in the Free Trade Zones should at least be 12,504 rupees to have a decent life.

The differences found can be used in negotiations with local employers and the governments, to reinforce demands for a realistic minimum wage. The discrepancy between what is being paid to workers and what actually is a LW can also be used in campaigns to bring more pressure on global brands and retailers about their responsibility for decent wages.

Step 6. Campaign for the AFW to be implemented

Now we have a definition of a LW, a way of calculating it, and a common wage demand for main garment producing countries in Asia. The sixth step is therefore to develop a campaign that will mobilise, lobby and negotiate for the AFW to be implemented. Since the AFW is conceived within a global industry, the campaign for AFW must also be international, as well as national and regional. This requires building a transnational movement that will use different avenues and strategies to win the demand. This includes:

- *Emphasising the right to organise:*

In this campaign, unions and other workers' organisations are central to formulating, arguing and winning the demand. The AFW can become a reality for workers only if it is won and then also implemented and enforced. Implementation has to involve different institutions and agencies. However, enforcement can *only* be done effectively with union and workers representatives as part of the process. Therefore, the right to organise will be central to the ultimate success of the AFW campaign.

- *Pressuring global buyers (brands and retailers):*

It is crucial that the entire industry plays a role in raising labour standards across the board. This includes companies that source from these countries. Therefore, global brands and retailers should come under pressure to factor the AFW into their price negotiations with manufacturers. This is linked to the issue of *fair pricing* by sourcing companies. Since wages represent only a small percentage of the retail price – between 0.5 and 1.5 per cent – the AFW alliance believes that the supply chain has the capacity to absorb such wage increases without too much difficulty. In addition, global brands and retailers should commit themselves to buying from unionised factories.

- *Pressuring first-tier manufacturers:*

Large manufacturers, or Tier 1 companies, have emerged that often employ thousands of workers and have direct supply relations with major brands and retailers. These companies have made large investments not only in factories, warehouses and dormitories, but also in acquiring specific knowledge on the recruitment of labour, and in establishing relations with local authorities. Because of their close (direct) relations with global sourcing companies, Tier 1 companies are more vulnerable to pressure from those buyers on labour standards, and this can further aid the process of collectivisation and union organisation in these factories. Alliance members in producer countries will apply pressure on the major 'Tier 1' supplier companies to ensure price increases are passed on to workers in the form of higher wages.

- *Lobbying governments to increase the minimum wage:*

Governments should ensure that minimum wages are set at a level that provides for a LW. Currently, many governments keep wages deliberately low in order to attract business. The campaign will lobby producer country governments to enact legislation that gives AFW legal backing.

- *Building solidarity linkages across the global chain:*

The AFW aims at building solidarity linkages with workers along the supply chain, active in logistics, warehouses, retail. Combining forces with other organising drives and LW initiatives will not only be important to win the AFW, it also 'raises the consciousness of workers and allies to better understand the global attacks on collective bargaining rights and the inter-connectedness of their struggles within a globalized industry' (Bhattacharjee *et al.*, 2009).

- *Engaging consumers:*

Involving consumers will be important to exert pressure on brand-named and retail corporations to start paying the AFW. Alliance members in consumer countries should apply pressure on major brands and retailers to sign agreements committing them to incorporate the AFW formula into their price negotiations with suppliers.

Conclusion

Global brand-named companies and retailers have profited hugely from outsourcing production towards low-wage countries, not only by capitalising on poverty wages but also by benefiting from the weaker enforcement of laws regarding wages, working conditions, and labour rights. The power of global buyers to fragment production over hundreds of factories and dozens of countries means that wage gains are increasingly difficult to achieve on a factory scale or national scale. While collective bargaining would be the best route to establish a decent wage level, the nature of the global supply chain is a barrier to both organising and effective negotiation. This indicates a growing need to construct an additional approach towards achieving a LW. The AFW is both a substantive and a strategic concept – it aims to define and achieve a wage which is sufficient to support a minimally decent and dignified life, and to provide a basis (or rallying point) for workers and allies from many countries to unite in a progressive struggle for better working conditions and a fair share of the value they produce.

Garment production is obviously not limited to Asian countries. In many African, Central American, Middle Eastern and Eastern European countries, wages are appallingly low. Garment workers here face problems similar to those of workers in Asia: wages that fail to meet basic needs, employers who disrespect trade union rights, unhealthy working conditions, and women workers who suffer the most. What is more, they are often producing for the same brands and retailers. The concept of the AFW campaign is replicable in these other regions. Workers there are encouraged to put their heads together to define, propose, and campaign for a regional floor wage based upon LW standards. Of course, the idea can also be endorsed by workers outside the garment industry. Together, this might help eventually, to build a case for a global floor wage and to bring an end to the race to the bottom.

Notes

- 1 For more information see: www.asiafloorwage.org.
- 2 See here for full list of participants: www.asiafloorwage.org/asiafloorwage-Structure.htm.
- 3 Calculation by the National Economic and Social Development Board with assistance from UNDP and the Thailand Development Research Institute.
- 4 This is an average and low income households in the US may spend up to 37 per cent. Source: *Food Spending in American Households, 2003–04/EIB-23*, <http://www.ers.usda.gov/publications/eib23/eib23fm.pdf>.

Part IV

Transnational solidarity in defence of the public sector

10 Challenging privatisation and access to health care services

The role of trade unions

Jane Lethbridge

Introduction

Public health care systems have become increasingly commodified in the past 15 years. National public health care systems have developed with their own specific histories and this often influences the effects of commodification. As a way of preparing the public health care sector for competition and marketisation, an initial reform is for public hospitals to become 'corporatised'. Public hospitals have to operate according to business principles. This contributes to the commodification of health care, even if full privatisation does not take place (Sen, 2005; Leys, 2001). The private sector has entered public health care systems through several mechanisms. Services have been gradually contracted out to the private sector. The development of public – private partnerships to build and manage new hospitals has presented many governments with an apparent solution to short-term funding, although in the long term, the government will be paying the private sector through inflexible long-term contracts (Pollock, 2004). There is a growing presence of private sector companies operating in public health care systems as well as significant changes taking place in the related role of government (Lethbridge, 2005).

The impact of these changes on health care workers and on health care users has been felt in a variety of ways. For health care workers, their socio-economic security has been undermined by either the introduction of corporatisation to public sector hospitals, or the contracting out of services to the private sector. Changes in wages levels and terms and conditions are the immediate results of commodification of public health care, leading to increasingly precarious employment (Afford, 2003). The lack of investment in public health care combined with deteriorating working conditions has resulted in depleted public health services (Laurell, 2001). It has also led to the migration of skilled health workers from many low income countries to higher income countries. For health care users, the effect has often been to limit access and worsen the quality of services delivered (Gilson and Mills, 1995; Bloom and Lucas, 1999; Bloom and Standing, 2001; Hilary, 2001; Lister, 2006). It also creates a feeling of insecurity about the future of health care provision. The introduction of user fees has often had a devastating effect, restricting access to health care even when there are exemptions for disadvantaged groups (Gilson and Mills, 1995; Nyong'o and Kutsin, 1999; Jeppsson, 2001).

The nature of health care has an important influence on the types of resistance to changes in public health care services. Access to health care, which is free at the point of access, is an important factor in preventing loss of income due to illness, thus contributing to reducing income inequalities. People use health care services throughout their lives and often have close ties with local health care facilities. When these facilities are threatened, people respond with strong campaigns. The relationships between health care users and health care workers may be strengthened by campaigning together (Lethbridge, 2004). This chapter discusses new models of trade unionism and transnational solidarity that have started to challenge more traditional forms of labour organising as well as the concept of health activism. Two case studies explore the nature of trade union action which is challenging the reforms taking place in the public health care sector. The first case study examines the campaign against health care privatisation in El Salvador, led by health care trade unions. The second case study looks at the alliance between the Treatment Action Campaign (TAC) and the Congress of South African Trade Unions (COSATU) in South Africa which campaigns for increased access to treatment for people with HIV and AIDS. The chapter concludes with a comparison of these two alliances.

New models of trade unionism

Over the last two decades, trade unions have had to deal with falling memberships, the rapid movement of capital and increasingly '*precarious*' employment, accompanied by a hostile environment towards organised labour. The search for new strategies that will strengthen trade unions has focused on the development of community alliances and an increased international perspective. An initial discussion of the terms '*social movement unionism*', '*new labour internationalisation*' and '*health activism*' leads on to two case studies of changing relationships between trade unions and civil society organisations and the role that transnational solidarity played in these alliances.

Social movement unionism

'*Social movement unionism*' is characterised by unions taking action on issues, which effectively combine collective bargaining activities and collective action (Hyman, 1997; Moody, 1997). This may involve campaigns for housing, social services, health, education and other basic public services. Union democracy is an important feature of '*social movement unionism*'. Unions fight for power and organisation in the workplace as well as reaching out to other unions at local, national and global levels, community organisations and other social movements (Hyman, 1997; Moody, 1997). There is some evidence to show that '*social movement unionism*' does not lead to immediate successes in challenging neo-liberal policies. The United Electrical Workers (UE), in the United States, worked with local community groups but it was not enough to stop large lay-offs of the workforce. Schiavone (2007) found that although the rank and file played an important

role in these alliances, he felt that Moody underplayed the role of professional union organisers and union leadership at all levels. Wills (2001) explores the concept of '*community unionism*' and the potential for trade union renewal in the United Kingdom (UK). In order for trade unions to work with community organisations on issues of social justice, she argued that the trade union movement would have to address issues of how to recognise difference but encompassing equality (Yuval-Davis, 1999). UK trade unions had been relatively silent on these redistribution issues, although this is beginning to change.

New labour internationalism

Moody (1997) recognised the importance of trade union action at local, national and international levels. There has been increased activity, at global level, among trade unions, with increased networking and information sharing (Carr, 1999; Waterman, 2005). Labour internationalism is not new. The '*old*' labour internationalism has a national focus and is based on trade unions in the North. Internationalism is an extension of trade union diplomacy. The '*new*' labour internationalism has moved from transnational collective bargaining to a '*social movement unionism*', involving broader coalitions and campaigning for wider labour, environment and social justices issues (Munck, 2004). Networks and networking can facilitate ways in which workers can articulate their needs, in a way that is appropriate in a globalised world (Waterman, 2001). One of the major criticisms of '*social movement unionism*' is the lack of systems of '*representativity*' of community groups or non-governmental organisations but Waterman asserts that to criticise them for lack of '*democracy*' or '*representativity*' is to misunderstand the nature of the new radical-democratic movements (Waterman, 2001: 327). Waterman has criticised the focus of '*social movement unionism*' as being limited to examples in one place, rather than searching for global and universal alternatives. Trade union responses to globalisation raise issues of how place, space and scale influence campaigns. How workers organise, at different levels, has a direct influence on workers' solidarity across space (Ghigliani, 2005).

Several studies have analysed the processes that contribute to growing transnational links. Novelli (2004b) provides a useful study of how a regional trade union transformed itself into a social movement union that operated, at many levels, from local to global. Webster and Lambert (2003) provide an account of some of the practical issues of drawing different national trade unions together through an analysis of a southern based trade union network '*Southern Initiative on Globalisation and Trade Union Rights*' (SIGTUR). As a network organisation based on democratic trade unions in the South, SIGTUR operates in '*cyberspace campaigning and organization*', but with no hierarchy, structure or control (Webster and Lambert, 2003:7).

Health activism

The concept of '*health activism*' is a broad term that covers a range of resistance efforts, which may include isolated protests and the actions of a single organisation, as well as many of the characteristics of social movements (Zoller, 2005: 347). Health social movements and community organising are included within the wider umbrella of health activism. Geist-Martin *et al.* (2003) see health activism as 'taking responsibility for individual health, working to improve health conditions for a group, and making efforts to change and improve policies for large groups of people' (Zoller, 2005: 344). Health activism is a form of health citizenship, attempts to challenge existing order and power relationships. Zoller (2005) refines three categories of health activism: activism for medical care access and improvement; illness and disability activism; public health promotion and disease prevention activism. Campaigns against changes in care delivery and trade union campaigns against reductions in health services are both forms of activism for medical care access and improvement (Brown *et al.*, 2004). The literature on social movements has not yet been integrated into health communication theorising and health (Zoller, 2005). Much of the research into '*social movement unionism*' has focused on trade unions in the manufacturing sector, concerned with the effects of increasingly mobile capital. By their nature, many public services that serve local communities, such as healthcare cannot be relocated in another country. The effects of privatisation, on public service provision, may affect local communities immediately.

As a way of exploring some of the issues the experience of trade unions, working with social movements in challenging aspects of health care commodification will be analysed in two case studies: the privatisation of hospitals in El Salvador and a campaign for access to HIV/AIDS treatment in South Africa. The El Salvador case study features a trade union-led campaign against privatisation of hospitals in El Salvador, which built on other campaigns against the privatisation of other public services. The South Africa case study is an examination of an alliance between the COSATU and the TAC which campaigns for improved access to HIV/AIDS treatment. Material was gathered through a review of public documents, local and national press coverage, and publications of organisations involved in the campaigns.

El Salvador: campaigns against health care privatisation

The Salvador Institute of Social Security was set up in 1994 as part of a structural adjustment programme in El Salvador that introduced changes to the way in which health services were administered (Jovel *et al.*, 2003). Threats of health care privatisation became more evident after 1999, when two hospital concessions were created. The government launched a publicity campaign to create dissatisfaction among patients and to destabilise the health care system as a prelude to a new health sector reform plan. The government had already started to privatise different services within the health care system. In 2002, the National Association

of Private Business presented proposals for the 'modernisation' of health care services to the President. The ARENA government had already privatised the banking, telecommunications and electricity sectors, which had resulted in price rises, experienced disproportionately by the lower income groups in the population (*Centro de Intercambio and Solidaridad*, 2002).

In 1999, all the workers employed by the Salvador Institute of Social Security came together, for the first time, in a strike for labour rights. Over the next few years, the struggle for labour rights was combined with a fight against health care privatisation (*El Faro*, 2005). In August 2002, 700 doctors went on strike in El Salvador, protesting against plans to privatise health services and demanding the resolution of proposed collective agreements (*El Faro*, 2005). The strike was led by the '*Sindicato de Trabajadores del Instituto Salvadoreño del Seguro Social*' (STISSS). There was widespread support for the strike. Over 200,000 people joined a demonstration in October 2002 and this support continued throughout the strike until May 2003. The demonstrations drew support from student groups, women's organisations, disabled veterans of the armed conflict, trade unions and non-governmental organisations as well as health care workers from throughout the country. Known as '*marchas blancas*' (white marches), participants wore white as a sign of peace and solidarity with the white-clad health care workers. As a sign of its anti-liberalisation focus, one of the most widely used slogans was '*health is a right not a commodity*' (Zwahlen, 2002). There was also some support, within the National Legislative Assembly, for maintaining a public healthcare system. On 17 October 2002, the National Legislative Assembly had approved a decree '*Guaranteeing Health and Social Security*' that would have stopped the privatisation of the guaranteed state-provided health care. However, the limits of this parliamentary support became clear two months later on 19 December 2002, when, following a deal with President Flores, the Legislative Assembly overturned the earlier decree against privatisation.

The strike ended in June 2003 after 10 months with an agreement between the government and the STISSS, the trade union representing workers of the Salvador Social Security Institute (ISSS). One element of the agreement helped to extend free medical care to over a million people. In addition, the government agreed to reinstate the striking workers and those who had been dismissed as well as paying half of the salaries that had not been paid during the strike. There was no agreement by the government not to introduce privatisation in future, although due to the extensive popular support for the strike, it had withdrawn three decrees, which would have promoted health care privatisation. The secretary-general of the ISSS doctors' union said: 'The greatest achievement of this strike is that we reactivated the social movement, and were able to block the privatisation' (*Interpress News Services*, 2003). Although the 2002–3 strike achieved benefits for health care workers as well as users of the health service, trade unionists have continued to experience intimidation and threats because of their continued criticisms of the government. In May 2004, the leader of STISSS, Ricardo Monge, and six other members of the union were arrested for demonstrating outside the cathedral in San Salvador (*El Faro*, 2005). A further strike from the end of 2002 until July 2003

maintained pressure on the government. Trade union members received death threats.

In 2007, President Saca announced a new health sector reform law. Once again, trade unions and civil society organisations organised a series of ‘white marches’ to demonstrate against the plans, starting on 16 June 2007 in San Salvador (SIMETRISSS, 2008). On 26 June 2007, *Sindicato de Medicos Trabajadores del Instituto Salvadoreño del Seguro Social* (SIMETRISSS) organised the first Forum for the Defence of Health in the Medical College, with the Citizens Alliance against Privatisation. This was further evidence of a strong alliance between health worker trade unions and civil society organisations (SIMETRISSS, 2008). On 20 August 2007, representatives of the Citizens Alliance against Privatisation presented a series of observations and comments on the proposed health reform law to the Legislative Assembly (SIMETRISSS, 2008). As an indication of the widening trade union alliance fighting against privatisation, members of SIGEESAL (Association of workers of health care in El Salvador) took part in a strike at a hospital and public health clinic in the San Vicente department on 6 July 2007. The strike affected administrative activities but not the provision of medical care (*Centro de Intercambio and Solidaridad*, 2007). Two months later on 4 September 2007, four trade unionists, members of SIGEESAL, were arrested and charged with ‘aggravated damages and disorderly conduct’. This accusation was linked to the ‘Special Law against organized crime and complex crime’, which use ‘special’ non-independent judges and tribunal and was created in August as part of changes in the Penal Code and Penal Process code (Article 348). The change in the Penal Code has been used as a way of criminalising popular protests. Previously the Anti-terrorist law has been used against social protestors but arrests often drew a large international response so that activists are now being charged with disorderly conduct a criminal offence, which carries up to ten years in prison (*Centro de Intercambio and Solidaridad*, 2007). On 7 September 2007, the ILO Conventions 87 and 98 became law in El Salvador, which cover the right to organise and collective bargaining. The arrests were a violation of these rights. The four trade unionists were eventually released in October 2007. However, later that month, the proposed health system law was passed by the National Assembly, with no amendments to the sections that would facilitate the privatisation of health care services.

Transnational networks

The value and strength of transnational support emerges clearly in the above account of why demonstrators in El Salvador are now being charged with criminal damage rather than terrorism offences. The international responses to arrests on terrorism charges forced the El Salvador government to change the Penal Code in order to criminalise social protest. The transnational solidarity networks that provided support for people in El Salvador campaigning against health care privatisation can be grouped into four types of solidarity towards: El Salvador; social justice/human rights; labour rights; health rights. These are not mutually exclusive.

Table 10.1 Transnational solidarity networks that provide support for El Salvador

	<i>El Salvador</i>	<i>Social justice/ human rights</i>	<i>Labour rights</i>	<i>Health rights</i>
The <i>Centro de Intercambio and Solidaridad</i> (CIS) aims to promote solidarity and cultural exchange across borders, between the Salvadoran people and others, for development and dignity	YES	YES	—	—
CISPES (Committee in Solidarity with the People of El Salvador) works for solidarity with El Salvador and sets events in El Salvador in a wider context Central America and US relations	YES	YES	—	—
Doctors for Global Health are a not-for-profit organisation promoting health, education, art and other human rights throughout the world.	YES	YES	—	YES
Public Services International – international trade union		YES	YES	—

Sources: *Centro de Intercambio and Solidaridad* www.cis-elsalvador.org; CISPES www.cispes.org; Doctors for Global Health www.dghonline.org; Public Services International www.psi-world.org

The provision of information about what is happening in a country, which helps to make more people aware of events that are not covered by the mainstream media, is one of the most important functions of transnational solidarity networks. Information on the El Salvador doctors' strike in 2002 was disseminated through websites of several solidarity and social justice organisations, based in the United States and Canada. The provision of information may be the first stage in the development of a campaign calling for action. Another form of support is in making people aware of wider connections between events in one country and wider global struggles for social justice.

Transnational solidarity with health care anti-privatisation campaigns in El Salvador has to be seen in the context of solidarity that developed through the Civil War in the early 1990s. Several organisations and international networks have continued to work for social justice and human rights in El Salvador. There has been a strong church presence. Some of the solidarity organisations have been transformed since the civil war period. *Doctors for Global Health* was founded in 1995 by volunteers who were accompanying the communities of war-torn Morazán province in north-eastern El Salvador in their struggle to implement primary health care and public health services. The organisation now works for education, health and other human rights throughout the world (*Doctors for Global Health*, 2008). The creation of transnational links for a specific campaign is a significant event and can form a base for future transnational solidarity.

Health professionals

The role of health professionals, particularly doctors, can be instrumental to the success of a campaign against privatisation. When doctors take strike action, this can affect the healthcare of people directly and is often a difficult decision for doctors to take. In some countries, health workers do not have the right to strike. In countries where health workers have the right to strike, strong support from patients and health service users is needed if the strike is to be successful. In El Salvador, there was strong support by the population for doctors on strike. This provides some insight into the nature of the relationship between health workers, particularly doctors, service users and local people in El Salvador, during this period. This can be analysed in relation to the changing status of health professionals in public services. The introduction of business models to public health care services can result in the power of health professionals being challenged or eroded by managers, reducing their influence over budget priorities and the allocation of resources.

The significance of this case study is that health trade unions and civil society groups came together in a struggle against health care privatisation. The success of the initial campaign against healthcare privatisation was rooted in several factors. Popular support was generated partly because of the important role that health care plays in people's lives, but also because the population has previous experience of privatisation. The campaign resulted in the '*reactivation*' of a social movement. This is important to understand because the campaign was led by health care trade unions and can be seen as part of the '*movement*' activities of trade unions, rather than an initial process of developing coalitions with a social movement. In this sense, it does not correspond, at this stage, to '*social movement unionism*'. There were also elements of political party politics involved in the campaign. The ARENA government was becoming increasingly unpopular. The groups involved in the campaign were largely supporters of the FMLN, the political party that emerged from the guerrilla movement. The trade union – social movement was not outside mainstream politics, but was playing a role within the political system.

In 2007, five years after the successful doctors' strike, the campaign against health care privatisation failed. The reasons for this lay in a more polarised political environment. The government had introduced harsher measures against social protestors. Trade unionists and campaigners had received death threats and several activists had been assassinated since 2005. However, even though the struggle against the marketisation in the health care sector had been lost, there are indications that struggles against privatisation will continue. A new citizens' organisation had been set up to fight privatisation. Health trade unions were more united. A parallel campaign against water privatisation was being fought.

South Africa: campaigns for access to HIV/AIDS treatment

The South African trade union experience has had a strong influence on the conceptual development of '*social movement unionism*'. In the 1980s, the COSATU and civil society organisations worked together to promote the cause of democracy,

bringing workplace and community struggles together (Hirschsohn, 2007). The case of COSATU and its alliance with the TAC shows how relations between trade unions and civil society groups, formed to fight for access to health care, have evolved over time. In South Africa, the trade union movement became involved in campaigning for healthcare, particularly access to HIV/AIDS treatment, because this directly affected its members. The high prevalence rate of HIV/AIDS in South Africa, with up to 30 per cent of the adult population HIV positive and the lack of effective treatment is impacting on the social and economic system, which will affect South Africa for decades. Trade union members need to secure rights to treatment for HIV/AIDS. It is a major health and safety issue and features within collective bargaining agreements. COSATU and other trade unions provide health education programmes for their members (Lethbridge, 2004).

The development of an alliance between COSATU and the TAC, the major NGO campaign for AIDS treatment, was triggered by the lack of government action on HIV/AIDS. TAC is a non-governmental organisation that campaigns for better treatment for people with HIV/AIDS. In this sense, the campaign had great political significance. Even after the South African government had won an international case against 39 pharmaceutical companies in 2001, which should have facilitated opportunities for producing generic drugs for HIV/AIDS, it was still not providing access to HIV/AIDS treatment. This motivated COSATU and the TAC to work together. The TAC has been described as a social movement because although it has a conventional membership structure, there is no distinction between members, supporters, volunteers and activists. Members are elected to a national executive committee but social sectors, such as children, youth, labour, health professionals, faith-based groups are also represented (Friedman and Mottiar, 2004).

When the alliance, between COSATU and the TAC, was first set up in 2002, it was considered to have the potential to threaten the relationship of COSATU with the ANC government and the communist party (*Africa News*, 28 June 2002). This shows the significance of COSATU joining a campaign against the ANC government. However, relationships between COSATU and non-government organisations (NGOs) were not always so cooperative. In 1999, when the government proposed to make notification of HIV status mandatory, the trade unions and NGOs reacted in different ways. NGOs felt that notification would increase the stigma, and often violence, experienced by people with HIV/AIDS. Trade unions felt that if high profile individuals made a public statement about their HIV status, this would help to change attitudes and encourage people to seek treatment and education. There have also been tensions between trade unions and civil society groups about the balance of resources going into the treatment and prevention of HIV/AIDS (Lethbridge, 2004).

Since the creation of the COSATU and TAC alliance, several joint conferences have provided opportunities for shared discussions. A major conference, in 2002, showed how this joint working relationship was beginning to influence the understanding that trade unions and NGOs had of each other, which was leading to a better understanding of health workers. Two hundred trade union delegates and three hundred NGO representatives were present. The conference discussed

strategies for better HIV prevention, improved management of care and distribution of anti-retroviral drugs in public hospitals (COSATU/TAC, 2002). Some of the working groups looked at the experience of both people providing health care and those receiving it. It emerged that although health care professionals were committed to providing care, it was becoming increasingly difficult to deliver. This was due to a shortage of nurses, an inadequate supply of medicines, lack of support and lack of capacity to implement new policies from regional and national governments (COSATU/TAC, 2002). One conference working group concluded that 'providing quality care in the public health services depends on rebuilding relationships', at different levels of the health services and between different groups in and outside the health system. It also supported increases in wages and improvements in working conditions and terms and conditions for health workers in order to prevent the exit of health workers from the public sector (COSATU/TAC, 2002).

Perhaps one of the most interesting developments was the recognition of '*treatment literacy*', which was needed for health workers, carers and other individuals concerned with HIV. This suggests the demystification of treatment, which has been traditionally seen as part of professional power, and a willingness for a wide range of groups to be educated in the same issues (COSATU/TAC, 2002). One campaign, where COSATU and TAC agreed to differ, was the civil disobedience campaign in 2003/4, which TAC launched after the failure of the government to sign an agreement at the National Economic Development Labour Council (NEDLC) for an AIDS treatment plan. COSATU did not participate because '*we felt that our members would see this as an attempt to overthrow the government. It also placed them at risk if they participated*' (Friedman and Mottiar, 2004: 13). Even so, COSATU played an important role in getting this issue onto the agenda of the NEDLC (Mbali, 2004). As a further indication of a strengthening alliance, COSATU, TAC and the South Africa Council of Churches (SACC) announced, on 22 November 2005, that they were joining together to campaign for HIV/AIDS treatment because of the continuing lack of action by the South African government. They agreed on three critical actions: to devise a national HIV prevention plan to challenge the stigma around HIV; to encourage voluntary testing and changes in behaviour; and to increase the number of people accessing anti-retroviral treatment (COSATU, 2005).

There is growing evidence that the alliance between COSATU and TAC is leading to collaboration on wider social justice and labour issues. TAC joined a wider trade union campaign to oppose textile imports. It had previously worked with the Basic Income Grant Coalition to organise a march in support of a basic income grant. In 2007, COSATU played a mediating role between TAC and the National Association of People Living With AIDS by passing a resolution at the COSATU Congress (The Presidency, 2007). TAC and COSATU have also worked together with other groups on health rights issues. In 2007, TAC and COSATU, together with two other health care trade unions and a hospital crisis committee in the Western Cape, campaigned to stop bed closures and focused on the impact of bed closures on access to health services for poor people (*TAC Electronic Newsletter*, 25 November 2007). In 2008, TAC and COSATU, together with the South African

Communist Party, Amnesty International South Africa and the Eastern Cape NGOs Network called for greater involvement of civil society organisations in health plans and services (*TAC Electronic Newsletter 20 June 2008*).

Transnational networks

Transnational networks have provided important support for both COSATU and TAC. The networks that support COSATU are predominantly trade union based. TAC networks are focused on HIV/AIDS and link to many global networks that campaign and provide support on HIV/AIDS issues.

The campaign for access to treatment has been supported by international campaigns, for example the International Treatment Preparedness Coalition, and international solidarity networks linking NGOs, health workers and researchers (Cullinam, 2005). The first meeting of the International Treatment Preparedness Coalition met in Cape Town in March 2003 (HIV Collaborative Fund, 2008). International HIV/AIDS conferences brought practitioners, activists, service users and other groups to share experiences and develop future strategies to campaign for access to HIV anti-retroviral drugs. The South African government has been the focus of many campaigns because of its denial of HIV/AIDS and its refusal to provide anti-retroviral drugs. International pressure has helped to make the South African government recognise the seriousness of the situation.

One of the advantages of transnational solidarity alliances, as seen by TAC, is that they do not require many resources to maintain and '*we don't need a direct presence abroad to build international support*' (Friedman and Mottiar, 2004: 22). However, TAC has found that transnational alliances are not '*cost-free*' in political terms. When TAC agreed with two drug companies, a formula for making cheaper medicine, some allies thought that TAC should have taken the companies to the Competition Commission (Friedman and Mottiar, 2004: 23). The reasons for joint

Table 10.2 Transnational networks for HIV/AIDS

	<i>HIV/AIDS rights</i>	<i>Social justice/ human rights</i>
MSF Belgium – a global NGO working on health issues	YES	YES
Act Up – global HIV/AIDS network	YES	YES
International Treatment Preparedness Coalition – a worldwide coalition of people living with HIV/AIDS and their advocates.	YES	—
Pan-African network of AIDS treatment activists	YES	—
Southern African Development Community and African Union	YES	YES
Friends of TAC UK	YES	—
Global Unions HIV/AIDS programme	YES	YES

trade union and civil society actions are rooted in the failure of the government to provide adequate services. The struggles are part of a wider struggle for development policies and their implementation to address major problems in South Africa. In this sense, campaigning for improved treatment for people with HIV/AIDS by COSATU and TAC has contributed to a broader social movement.

Health professionals

The power of health professionals has often been challenged by patients' groups because of their control of access to treatment. In the case of HIV/AIDS, the relationship between patients and health professionals has been challenged because of new approaches to treatment. The concept of 'treatment literacy' was discussed at a joint COSATU/TAC conference. TAC has played a leading role in promoting and training people, patients, advocates, carers, health workers, in understanding HIV/AIDS treatments, but it has not always developed good relationships with all health professionals. An evaluation of TAC in 2005 found that, although it had developed some relationships with individual health professionals, it had not developed a significant base of support in the health care sector (Boulle and Avafia, 2005). There have been several occasions recently, when TAC has supported health professionals, who have taken a critical position towards existing provision of health services. Sometimes, health professionals have been suspended following their criticisms of health care provision. Their stance is motivated by their professional commitment to their patients. In 2005, hundreds of health care professionals, involved in the case of HIV/AIDS patients wrote to the provincial administration in the Western Cape to protest about the activities of the Dr. Rath Health Foundation that promotes the use of vitamins as treatment for HIV/AIDS and discourages the use of anti-retroviral treatment. The South African Medical Association joined with TAC in a legal challenge to the South African government for not controlling the Dr. Rath Foundation (Sidley, 2005). In 2008, TAC was successful in banning Dr. Rath from using multivitamins in clinical trials (*PlusNews*, 2008). In 2007, TAC took legal action against the sacking of 41 health workers from a clinic in Khayelitsha, near Cape Town. TAC argued that the dismissals were 'a violation of patients' constitutional rights to life and dignity' and "were an unlawful and unreasonable curtailment of health services' (*Green Left Weekly*, 27 June 2007). The following year, TAC took up the case of a doctor who had been suspended in KwaZulu without pay for a month, because he had taken the official portrait of the provincial Minister for Health from the wall and put it in a waste bin. This was a reaction to a charge of misconduct made against another doctor and to the comments made by the provincial minister for health, who 'questioned the integrity of rural doctors' (*TAC Electronic Newsletter* 24 April 2008). These incidents show that the relationship between TAC and the medical profession is changing. It is perhaps an indication of the success of TAC's alliance with COSATU that has enabled it to support doctors, who are also criticising the government. It shows that campaigning for wider health rights, including access to health care services, provides opportunities for alliances with health professionals.

The form of success that is being measured by this case study relates to the way in which the relationship between TAC and COSATU has developed so that both organisations can contribute support to each other's campaigns. It has taken almost a decade to establish this form of trust and understanding. What began as an alliance based on the immediate needs of each organisation has become a much stronger relationship based on a more detailed understanding of the common issues that link both organisations beyond the issue of HIV/AIDS. In South Africa, the trade union confederation worked with a high profile NGO social movement to campaign for peoples' right to treatment for HIV/AIDS. Some of the tensions that arise between trade unions and NGOs were present at the beginning of their collaboration, but they have been dissipated as shared issues have become stronger. This presents an optimistic picture of how trade unions and non-government organisations can work together. This case study can contribute further insights into the '*social movement unionism*' that has already been influenced by the South African trade union-social movement experiences, although it can also be seen as a form of '*health activism*' because it was triggered by demands for better health care services for people with HIV/AIDS. One of the factors contributing to the success of the partnership was the recognition by COSATU that access to HIV/AIDS treatments was a crucial issue for its membership both now and in future. It had become a collective bargaining and health and safety issue and so a core trade union issue. By working with TAC, COSATU has also developed an important partner in its struggle for wider social justice issues. Education played an important role in bringing the trade union and NGOs together. The process of meeting together to discuss problems and future strategy has been a powerful force for raising awareness of each other concerns. Most significant has been the identification of '*treatment literacy*' where both health care professionals and service users recognise that they need training in order to deliver effective treatment.

Conclusion

'International solidarity is not an act of charity: It is an act of unity between allies fighting on different terrains toward the same objective' (Samora Machel (1933–1986)). There is increasing recognition of the interdependence of workers operating at local, national and global levels. International support has often proved essential for the success of a local campaign. This shows that workers recognise the need to support similar struggles elsewhere in the world. It is not always an easy process and effective ways of working internationally are still being refined. The importance of research and information sharing has started to emerge as a crucial element in campaigns that cover local, national and global issues.

These two case studies provide some interesting insights in transnational solidarity. The experience of transnational El Salvador solidarity networks shows how solidarity networks have changed and evolved over almost two decades. The aims of some networks have expanded to wider global support for people struggling against injustice. Others remain focused on Central America but try and make the connections between the United States and neo-liberal policies implemented in the

region. They still provide important support in the anti-privatisation campaigns that are currently taking place. Transnational solidarity networks in HIV/AIDS have provided essential support for activists in South Africa, trying to challenge the policy of the South African government towards HIV/AIDS. The Treatment Action Campaign benefited from transnational support although it also realised that support is not '*cost-free*' because supporters may have different opinions about actions taken by other network members. The Global Unions HIV/AIDS programme has the resources to provide practical support as part of wider political solidarity.

These two cases studies illustrate the role that transnational networks played in raising the profile of the campaigns and increasing international awareness of the struggles taking place. However, the transnational networks supporting the El Salvador campaign had evolved from solidarity support networks during the period of the Civil War into global social justice networks. In the case of international HIV/AIDS networks, their transformation has not been as significant. The broad nature of the alliances is one of the similarities between these two case studies but there were differences in the nature of leadership. In El Salvador, the campaign was led by the doctors' union, while in South Africa, the non-government organisation TAC was the leader. Both alliances have drawn in a wider range of groups as a result of their initial campaigns. For both campaigns, the nature of success can be measured in terms of the quality of the alliance and the importance of this as a basis for further campaigning. Although the first part of the El Salvador campaign was successful in stopping health care privatisation, five years later another government privatisation initiative became law. In addition, the political climate in El Salvador has become more hostile to campaigners. In South Africa, the South African government has made HIV/AIDS treatments more accessible, a success that the joint TAC and COSATU campaign contributed to, even though the struggle for accessible health care continues.

These examples have implications for trade unions and civil society organisations, involved in transnational networks. The creation of solidarity networks must be seen as a part of a longer process that may lead to the transformation of the original networks, as goals change. Some of the activities that transnational networks engage in have changed with new forms of information communications technology. However, this does not necessarily mean that it is any easier for different organisations to learn to work together. It is this part of transnational solidarity which is the most difficult, but greater awareness of how other networks have changed and evolved could help inform the creation of new transnational solidarity networks.

11 Thinking through transnational solidarity

The case of SINTRAEMCALI in Colombia

Mario Novelli

Introduction

On Christmas Day 2001, several hundred workers began an occupation of the headquarters of EMCALI, the public service provider of water, electricity and telecommunications in Colombia's second city of Cali. The occupation was a response to a government announcement to privatise the company. Thirty-six days later, the workers emerged victorious after signing an agreement to keep EMCALI public. During the occupation marches, strikes, protests and blockades were carried out in Cali by EMCALI workers affiliated to the trade union SINTRAEMCALI, with support from local trade unionists from the region and supporters from the local communities. In Bogotá, the capital of Colombia, towards the end of the dispute, a second one-day occupation took over the headquarters of the government Ministry responsible for implementing the privatisation process, which was defended by local trade unionists from the region. Meanwhile in the UK, regular protests were held outside the Colombian embassy in London, several live video-link ups were carried out between leaders of the UK's Trades Union Congress (TUC) and workers inside the Cali occupation alongside a range of other transnational solidarity activities, and letters of support and solidarity arrived from all around the world.

This chapter seeks to theorise how these multiple forms of class struggle and transnational solidarity were produced. In doing so, I will reveal that they did not emerge spontaneously, but were the fruits of a multi-scalar political strategy developed by SINTRAEMCALI over several years. This strategy had sought to forge strong local, national and transnational links in the defence of keeping water, electricity and telecommunications provision in Cali as a public service. In doing so, the leadership captured the imaginations, talents and energy of a wide range of individuals, radical organisations and oppositional forces, producing a collective vision of the dispute as not only 'against' privatisation, but 'for' the efficient and equitable management and delivery of public services in the interests of local people.

In order to begin, I will raise some conceptual issues concerning the concept of 'transnational solidarity', which is central to the book's focus. This will be then followed by drawing on Cox's (1998) notions of 'spaces of dependence' and 'spaces of engagement' as a framework to understand the networks of solidarity

relationships that were produced by SINTRAEMCALI in order to resist privatisation. I will then provide some foundational background to the situation of the Colombian trade union and popular movement. This will be followed by an exploration of the development of SINTRAEMCALI from the mid 1990s onwards and the different ‘spaces of solidarity’ that were constructed. I will then return to the occupation of EMCALI’s headquarters, the CAM tower, to highlight how these ‘spaces of solidarity’ came together during the occupation to produce more than the sum of their parts and ultimately proved too much for a Colombian government reeling under the relentless transnational solidarity processes. Finally, I will reflect a little on what the SINTRAEMCALI experience might tell us about broader issues of transnational solidarity.

Thinking Through Solidarity

Hyman (2002; see also Chapter 2 of this volume) unpacks the concepts of solidarity by separating three broad understandings. The first presumes some kind of ‘common identity’ relating to the membership of a particular group, clan, religion and so on. In this type of solidarity there is an appeal for collective loyalty based on being different from other groups. In the context of a trade union, that might be workers in a particular factory or sector. The second understanding of solidarity derives from ‘common interest’, which while potentially overlapping with the first, could also be a broader process of unity. This second type of solidarity implies that collectively we can better defend our individual needs. In this type of conceptualisation we can locate notions of the ‘common interest’ of the working class, which has been the classical rallying call for labour movements worldwide. The third understanding of solidarity implies ‘mutuality despite difference’. This third type of solidarity, Hyman argues, often draws on ideas of a common humanity and principles of core human values: the obligation of the strong supporting the weak, and common understanding of right and wrong, justice and injustice. While Hyman’s argument in the paper is to call for new forms of trade union solidarities that blend aspects of all three, he is also highly critical of stopping at the first conceptualisation: looking after members interests in very narrow terms, which he suggests can at least partly explain the global decline in trade unionism and its failure to speak, and to fight for, broader societal interests.

While agreeing with the broad thrust of his arguments, my own feeling is that we need a better understanding of the relationality between material ‘interests’ and ‘ideational’ commitments to processes of solidarity, and how multiple solidarities, might necessarily exist within one protest episode. Trade unions have focused on the first more ‘mechanical’ modes of solidarity precisely because these draw on direct and common member interests (better salaries, conditions etc.). As we move away from this first level, the direct ‘material’ gains of solidarity, both geographically and temporally, become more distant and therefore require more ideational justification. Crucially, building solidarity is not automatic, but requires strategic work and the need to ‘frame’ problems and solutions in particular ways. In summarising these insights we can say that solidarity can be a process that is both internal

and external to a particular group. In all cases it is rooted in some sense of common identity, interest and/or commitment (often shifting the level of abstraction – colleague, union member, class, citizen, human) and developed through a process of dialogue that seeks to link up the interests of the different parties involved. The case study will illustrate these points, and reflect on the differences between building solidarity among different constituencies.

Thinking through transnational spaces of solidarity

There is nothing new about workers organising beyond the borders of the nation state. From the founding of the International Working Men's Association and the rallying cry of 'workers of the world unite', there has long been a sense of the importance of international solidarity for labour movements. Yet processes of economic globalisation and restructuring have speeded up and intensified the interconnections and coordination of economic activity over the last three decades, re-organised the geography of capitalism, making transnational solidarity more important. For that reason, I now want to turn to questions of geographical scale, politics and the spatiality of resistance to think through some issues on transnational solidarity.

Much of the literature on economic globalisation notes how 'capital' in the wake of the economic crisis of the 1970s sought to break free from the nation-state regulation that it was previously bound to (taxation, national subsidies, import controls and tariffs) (Brenner, 2004). This shift beyond national borders has meant that capital has sought new forms of regulation to manage the expanding accumulation process. As the prior stage of 'Fordist' accumulation was based on national economies and inter-state relations, the new emerging form of regulation needed to find mechanisms beyond the nation state. This shift entailed a range of processes of rescaling and shifting the spatial relations of political, social and economic organisation and control. The shifting scales of accumulation, assisted by advances in technology, have redrawn the parameters for governance, power and control and have important implications for strategies of contestation and resistance covered in this chapter. Neo-liberal restructuring has thus broken down old 'spatial fixes' 'settlements' or 'social contracts' (Harvey, 1989; Brenner, 1999), and sought to forge new ones. We can thus interpret the conflicts over attempts to 'fix' new territorial pacts such as the European Union (EU) or the Free Trade Area of the Americas (FTAA) as battles between different social forces that may benefit or lose out in new territorial arrangements. Likewise, we can see the shift to both the local scale with increased policies of 'decentralisation' occurring simultaneously with a rise in the importance of supranational organisations such as the International Monetary Fund (IMF), the World Bank and the World Trade Organisation (WTO). At these different scales we can see competition between different countries over the type of future Europe or Latin America under construction, between corporations, between different sections of capital, and between labour.

Unlike in conventional understandings of scale (e.g. Hart, 1982) which perceive scales as being fixed or pre-given (i.e. the local, national and regional as permanent

entities), research in economic and political geography (Brenner, 1999; Cox, 1998) conceptualises 'scale' as being actively constructed for particular purposes by different social forces. Scales are thus arenas for social struggle that are both fought over, expanded and constructed. Hence, shifts in scale both upwards and downwards are means to shift contradictions and the potential for conflict to different locations where different social forces might be privileged (Gough, 2004). As Harvey (1989) notes, there are differential relations between different classes at different scales, and some social forces are better able to command and control certain spaces. This leads us to Castells' (1997) argument that, because labour is relatively immobile in relation to capital then labour and labour movements are likely to fade away as capital in its hyper mobile and fluid form shifts around the globe. Yet Castells' understanding is a highly static and undialectical one and presupposes the inability of labour to organise efficiently beyond local levels. As Andy Herod's work (c.f. 1998a; 2001) has noted neither capital's power nor labour's is static and can change over time. Furthermore, the notion that capital is global and labour fixed fails to recognise either the varied terrain of the global – with different relational forces present in different places – or that the global is also localised in some or other place where its power relations may be differentialised (think of global production chains with each component locally based). Ultimately, while it may be true that capital's newfound mobility has strengthened its structural power in relation to labour, it still has susceptibilities and weaknesses and labour has the potential to alter its own resources through strategic change and strategic solidarity.

Turning now to the particularity of the concept of 'transnational', most definitions encompass a notion that it is a process not confined to a single nation, but including, extending over, or operating within more than one. What we can derive from this is that it is a process that operates both within and beyond the nation state. Crucially for my argument, the concept does not by its nature imply a prioritisation of the 'external' (beyond the nation) but more importantly is a term that captures the sense of processes that do not necessarily begin and end within the confines of national borders. Drawing together the two concepts I want to argue that 'transnational solidarity' is thus a process that can be both internal and external to a particular group, rooted in a sense of common interest (either 'real' or 'perceived'), developed through a process of consolidating the interests of the different parties involved and that potentially takes place both within and beyond the nation state. Crucially, this conceptualisation of 'transnational solidarity' does not reify either the local or the global scale thus allowing us to go beyond both methodological nationalism, that sees social processes as beginning and ending at national borders, and an equally problematic methodological globalism, that posits the 'global' scale as being the primordial determining factor in labour struggle in this era of globalisation.

Having thought through some definitional issues on transnational solidarity, I now want to link them together and bring in strategy, by extending and applying the ideas of Kevin Cox (1998). He discusses this politics of scale by making an analytical distinction between 'spaces of dependence' – spaces that are to be defended and strengthened, and 'spaces of engagement' – which are sites which

different social actors draw upon to defend a 'space of dependence'. In essence he argues that conflicts and disputes often start in a particular place, and are rooted in particular physical and social relations, a 'Space of Dependence'. He goes on to say that:

People, firms, state agencies, etc., organise in order to secure the conditions for the continued existence of their spaces of dependence but, in doing so, they have to engage with other centres of social power, local government, the national press, perhaps the international press, for example. In doing so, they construct a different form of space which I call here a space of engagement: the space in which the politics of securing a space of dependence unfolds. This may be at a more global scale than the space of dependence, as per the idea of 'jumping scales' but it may not be.

(Cox, 1998: 2)

While Cox's conception of 'spaces of engagement' is useful to start thinking through the strategic nature of a particular struggle, it does not separate targets of intervention: the press, local government and so, from agents of solidarity that movements might link up with: fellow workers, NGOs and so on. In order to address this I will call the construction of solidarity relationships 'spaces of solidarity' and it is these relationships that provide the focus for the rest of the chapter. I believe that this framework can allow us to unpack the strategic nature of building solidarity, and how according to the 'space of dependence' different 'spaces of solidarity' can be strategically constructed.

SINTRAEMCALI, I will argue, constructed a network of solidarity alliances across a range of geographical scales, which were aimed at securing, defending and extending particular local 'rights'. The realisation of these local 'rights' – to work in EMCALI, to deliver and consume public services, to adequate human rights and labour protection – were tied to a particular 'material' locale upon which the members of the movement existed and resisted, and it is this 'space' that can be understood as a 'space of dependence'. The network of alliances that were constructed to defend this 'space of dependence' can be understood as 'spaces of solidarity'. These 'spaces of solidarity' were complex and multi-scalar, linking poor local communities who would face public utility price rises if privatisation went ahead, fellow trade unionists who saw in SINTRAEMCALI's struggle a revindication of their own confrontations with the Colombian state, international trade union activists who could relate to the negative effects of the privatisation of public utilities and so on. Before outlining these processes, first I want to provide a brief background to the context of trade union struggle in Colombia.

Trade Union Struggle in Colombia

The SINTRAEMCALI conflict is firmly rooted in the context of neo-liberal structural reforms that began in Colombia in the early 1990s. The shift to neo-liberalism in Colombia led to wide ranging transformations of social relations as

the economy 'opened up' to global markets. While Colombia has always been a highly stratified and unequal society, the neo-liberal era intensified those inequalities. During successive governments in the 1990s a range of policies based on a classic neo-liberal recipe of decentralisation, liberalisation, privatisation and fiscal austerity were attempted, with varying degrees of success, as workers, campesinos, indigenous communities, black communities, social organisations, students and trade unionists contested policy and engaged in defensive struggles to hold on to the limited gains won under the previous economic model (Ahumada, 1998, 2001; Sarmiento, 2001). For that resistance many social movements paid a heavy price for Colombia is also an incredibly violent place and state/social movement relations are permeated with violence.

According to government homicide statistics Colombia had, during the 1990's, around 25,000 violent deaths per annum (World Bank, 1999:4). While the vast majority of these deaths can be attributed to 'social' violence, according to Colombian Human Rights NGO's there were between 5,000 and 8,000 'political' murders per annum. While many of these deaths are linked to the decades, old civil war being fought out between Marxist inspired guerrilla movements and Colombian state and 'para-state' forces, the casualties go well beyond armed combatants and extend to broad sections of civil society and social movements. Within the context of what both the Colombian government and its US funded ally term 'a counter-insurgency war' the civilian population and non-armed civil society groups have often been targeted, particularly by the far right paramilitary organisations ('death squads') linked to the Colombian state (Human Rights Watch (HRW), 1996, 2000, 2001). Trade union and social movement activity and the defence of economic, social and cultural rights is generally interpreted as merely a cover for guerrilla activity and thus leaders and activists are constructed as being legitimate military targets (Stokes, 2004). This 'dirty war' has led to over three million people becoming internally displaced out of a population of 45 million. Within the Colombian trade union movement there have been over 4,000 union leaders and activists murdered since 1986 (CUT, 2008) by paramilitary organisations, which continues to make Colombia the most dangerous place in the world to be a trade unionist.¹

SINTRAEMCALI's Spaces of Solidarity

The push to privatise EMCALI, began in the mid-1990s. Prior to that, according to Alexander Lopez, the ex President of the trade union and architect of its renewal, SINTRAEMCALI 'was just a calm, normal union working on normal grievances' (Podur, 2003). However, the onset of neo-liberal restructuring in Colombia produced a new environment that forced the organisation to rethink its strategic direction. In response, a new and more militant group of workers began to take the initiative. The new leadership emerged from a rank and file committee that was born in the sewerage section of the company. After initially gaining success in improving working conditions for the sewerage workers, the rank and file committee began to push for greater influence in the trade union as a whole. In 1994, Alexander Lopez was elected to the Executive Committee (EC) and within

three years the balance of power within the trade union was won over to a position of radical opposition to privatisation. From that point on the question became one of strategy. How could the union take on a highly repressive state and its transnational allies in the complex and violent conditions of Colombia? Four linked strategic directions emerged which relied on the construction and strengthening of particular spaces of solidarity.

Worker/Community alliance

One of the crucial strategies that emerged was the necessity of reframing the conflict over public services away from a trade union/state problem to one between the Cali community and the state. This necessitated a broad strategic alliance with local poor communities, but the construction of this was not an easy task. There was a problem within EMCALI that could not just be explained by corrupt management practices. There existed a certain level of complicity between workers and managers in the weak performance of the company. This poor 'service ethic' served to legitimate government and media accusations that the workers benefited from the good salary and benefits provided by the company at the expense of the community. There was a need to change the attitude of workers, and the attitude of the local community towards them. This required a sustained process of education on both sides, and a meeting point whereby workers and local communities could join together (Interview with Alexander Lopez, 2002).

This process of building up relations with the local community began in the mid 1990's, and was aimed at raising the 'political consciousness' of the local marginalised communities and instilling EMCALI workers with a sense of civic pride and responsibility. This work ranged from organising public meetings, to workshops, to joining in local community demonstrations and protests and to the setting up of a formal technical school based at the union's headquarters aimed at teenagers unable to afford Secondary Education. One central initiative was the setting up of 'Minga Comunitarios' (an indigenous phrase meaning 'to come together'), whereby all EMCALI workers would give up one weekend per month and carry out repairs and damage to infrastructure in the poorest areas of the city. In order to cement this trade union/community alliance new forms of democratic representation emerged whereby the trade union and community activists could develop joint proposals on strategy for the defence of public services. All of these initiatives served to develop strong bonds between workers and local communities.

Alexander Lopez talks of the obstacles that the trade union initially faced in constructing these alliances for the attitudinal transformation that later prevailed:

In the beginning, we had resistance from the community, because the community saw the workers as the problem, and we explained to the community who are the real problem, and where the neo-liberal politics comes from, what is the World Bank, what is the IMF, because the people don't know this. It has been a very didactic strategy, very long, but also very beautiful and fruitful because . . . the community takes time to make a decision, but when it makes, it

makes it forever, I believe that the people, yes, they have this logic, they don't recognise a lot of things, but they feel it when you speak, when you explain, and these type of lovers are not temporary lovers but lovers that last forever.
(Interview with Alexander Lopez, 2002: 14)

The visible presence of the trade union in the neighbourhoods served the purpose of 'conscientisation' in Freirean terms (Freire, 2000), where a 'dialogical' process begins to emerge between organised labour and communities. As Alexander Lopez notes (Interview, 2002: 14), apart from attending to the real material needs of local communities, and raising political consciousness, these were aimed at providing a 'space' for challenging the attitudes of the communities and the workers towards each other.

Returning to the concrete outcomes of this 'space of solidarity', we can see that in the process of the development of the trade union/community alliance the community brought with it a range of material and ideational resources that assisted the SINTRAEMCALI struggle. This network of organisations and individuals to differing degrees would show solidarity to the union's struggle, engage in marches, public demonstrations, provide material and political support to the union, apply pressure on local political representatives, and disseminate further an alternative reading of particular disputes. On many occasions they have blocked roads, joined marches, attended public meetings and shown solidarity with the union in a range of ways, not least in defending the perimeter of the series of occupations, and particularly the 1998 and 2001 occupations.

Plan PARE: alternative development strategy

From the early 1990s SINTRAEMCALI had developed a collective understanding of the defence of public services as being a question of the defence of national sovereignty. However, what was lacking, was a negative critique of neo-liberal arguments on the inefficiency of state owned public services, and a positive critique of how public services within EMCALI could be made more efficient. This led to the development of the 'Plan PARE' for the recuperation of the company – a blueprint for the efficient management and delivery of public utilities that was developed by a combination of SINTRAEMCALI workers, sympathetic local technicians, lawyers, and financial experts. The plan had three phases: The first period between 1995 and 1999 focussed on investigating and exposing corruption within the company and highlighting that the crisis the company was facing was due to widespread management corruption, political interference and incompetence. The second stage, between 1999 and 2001 resulted in the worker led development of an alternative management plan for the company. This was presented by SINTRAEMCALI in late 1999 but not accepted either by EMCALI management, the local council, or the Superintendent of Public Services. However, this was to change in 2001 when local elections led to a change in administration and a commitment by the new Mayor to keep EMCALI in the public domain and to implement the plan. The third stage of the development of Plan PARE was its

implementation that began in May 2001. Within eight months EMCALI had begun to show impressive results in cutting costs, improving efficiency and reducing the company's debt. While SINTRAEMCALI celebrated the reversal of economic fortune there was deep anxiety in government circles about the example that EMCALI might be setting. On 24 December 2001 the national government sacked the new management team implementing the Plan PARE and announced intentions to push through with EMCALI's privatisation (Interview with Nelson Sanchez, 2002: 9). SINTRAEMCALI's response was the occupation that began the following day.

Addressing the issue of the management of public services through the critique of corruption and the pro-active Plan PARE allowed the union to enter into a whole series of new 'spaces of engagement'. In this new space the question of 'who manages, who controls' was once again placed on the negotiating table (Interview with Alexander Lopez, 2002: 22). SINTRAEMCALI began to reconceptualise its role away from one of mediation to one of worker control of production. This shift from mediation to control, while remaining partial, was a highly emancipatory shift as it began to throw up questions not only of workers' rights and benefits, but also of workers control of production and the challenging of the labour/capital relation. The development of the Plan PARE also represented an intense laboratory whereby workers developed the new skills and knowledge necessary to manage the company and develop alternatives. Crucial to this process was the culture of learning that emerged within SINTRAEMCALI, and particularly the developing interest of workers in learning every intricate detail about the functioning of the company. The Plan PARE action research project meant that the union had developed by 2001 an enormous knowledge of the day to day running of the company and its financial difficulties and was able to take its well-researched alternatives to a wide range of fora and debate alternatives. During these interventions, networking and contacts would be developed through which joint political projects could be discussed and strengthened with independent political forces. Several sympathetic representatives of Congress and the Senate would take up support of the case against privatisation. Furthermore, at the Municipal level support was given by the union to the Mayoral campaign of Jon Maro Rodriquez, who upon election in 2000 began to implement the Plan PARE. The mayor was able to do this because what SINTRAEMCALI was able to deliver was a constructive alternative development plan for the management of the company and a work force that was prepared to make a great deal of sacrifices in order for the plan to be successful.

Mobilisation strategy

The third strategic trajectory of SINTRAEMCALI recognised the conflictual nature of any alternative development plan and the need to apply pressure on the government. The union recognised that the social forces intent on privatising EMCALI would not be persuaded by words alone, and thus mass mobilisation and direct action had to be deployed. SINTRAEMCALI's mobilisation tactics included a combination of mass based demonstrations, road blockades and mass meetings that would often bring sections of the city to a standstill. However, the trade mark

of the union from 1994 became the 'occupation' of high profile buildings, a highly symbolic tool which focussed attention on an issue, raised the question of 'control', but did not inflict material damage on the company, nor cause unnecessary inconvenience to the general public. The most spectacular of these were the occupations of the CAM Tower in 1998 for 16 days and in 2001 for 36 days. On both occasions, these actions resulted in overturning decisions to privatise the company.

While the success of the mobilisations relied on local community support they also depended on a hard core of members and supporters prepared to put themselves at great personal risk. As noted earlier the internal transformation of the union was driven and sustained by a group of several hundred workers who emerged in and around the 'Comite de Base' (rank and file committee). These members had a strong ideological commitment to the union's objectives and to broader processes of political change within the city and country. This group were largely affiliates of SINTRAEMCALI but also included several local trade unionists from other companies, community leaders, leftist, and radical human rights activists who saw the defence of public services as a key domain of struggle. From this group come the 17 assassinated members, the forcibly displaced, and those that have been personally affected by the policies of state and para-state repression. Many were actively involved in the construction of the Plan PARE, and were involved in the militant actions such as the occupations, blockades, strikes, etc. that have developed since 1994.

When asked as to why this group was prepared to risk their lives for the defence of public services and thus for the union, Luis Hernandez, President of SINTRAEMCALI responded that:

I believe that you cannot buy this kind of loyalty, but you must construct it, and you construct it through a strong and responsible class leadership. I believe that those of us who have been leading this organisation have demonstrated this and have built up a consciousness amongst the workers. This is a long process, but effective, very effective. Those workers that have accompanied us in the different direct actions have felt the strength of our organisation which is expressed in the beautiful phrase 'hasta la vida misma'. We have been prepared to do this for a collective objective, as is the defence of public property, and defending the interests of the people.

(Interview with Luis Hernandez, 2002: 8)

He highlights the role of the range of political education processes that many of these activists underwent:

This loyalty has been developed from the training that our followers have received, and will continue to receive, because the good leader is in a evolutionary process, we are all in an evolutionary process and we are all learning, and developing and we will never have the final truth revealed, every day we need to learn more. That is why we are convinced that we need to generate more training and education. So that tomorrow it is not 500 workers but we

can double that number or triple it, in the sense that we can keep generating more consciousness to struggle amongst the workers.

(ibid: 9)

Many of this core group had friends assassinated since 1997, and had forged strong bonds with those comrades that they had engaged in direct actions and occupations with. During these occupations, intense solidarities and bonds of trust were forged. As one worker noted 'in the occupations we shared everything, if we had an empanada (small pie) we would divide it in six or seven pieces, we shared our thoughts, our fears and our lives' (Interview with Asdrubal Gonzalo, 2002: 9). This sense of collectivity and commitment provided the unpredictable element for the Colombian state because these people had lost their fear, or at least had learned to manage it. For SINTRAEMCALI, it was this bonding and commitment along with the new knowledge that developed during occupations that gave SINTRAEMCALI that vital edge in controlling those new spaces of protest.

SINTRAEMCALI and human rights and solidarity networks

The union's determination to mobilise and occupy to defend EMCALI and its uncovering of high-level corruption placed it in direct confrontation with sections of the political and economic elite. In Colombia this meant facing the full wrath of state and para-state repression. The 17 members assassinated, the false imprisonment of workers under charges of terrorism, and a general and persistent barrage of death threats and assassination attempts, led the trade union to adopt a range of preventative measures and work closely with national and international human rights organisations and networks. In 1998, a prominent human rights activist, Berenice Celeyta, set up a Human Rights Department inside the union to monitor human rights violations and to develop a strategy of human rights defence. At the local level, the human rights department trained local activists in human rights norms and mechanisms for self-defence. The training provided participants with methods of intervention into conflicts, how to set up a local human rights network among social movements, and a background into the human rights legal frameworks that exist at regional and global levels. These human rights training courses were expanded across the region in 2002 after securing international funding for the project. These graduates of human rights courses and diplomas are able to act as intermediaries with state forces, government representatives and international bodies in specific conflicts and were aware of the functioning of this global infrastructure.

At the national and international level the human rights department facilitated the involvement of major human rights organisations in SINTRAEMCALI's situation, and representatives of Amnesty International and Human Rights Watch have intervened several times. The involvement of Amnesty and Human Rights Watch is understood by the union's leaders as providing a cordon of protection, within which they carry out their activities, and a means of addressing and revealing Colombia's 'parallel state' of covert repression (Interview with Berenice Celeyta, 2002; HRW, 1996, 2000, 2001).

Closely related to this network is the role of the supranational labour and human rights bodies, such as the International Labour Organisation (ILO) and the Inter-American Human Rights Court (IAHRC). SINTRAEMCALI, with the assistance of national human rights organisations, took their case of systematic persecution from state and parastate forces to the IAHRC. On 21 June 2000, the court found the Colombian government responsible for not providing adequate security for the trade union to carry out its internationally legitimate duties. The court ordered the Colombian government to provide protection for the entire leadership of the union including bodyguards, weapons, bullet-proof vehicles and communications equipment (IAHRC, 1999). This protection, while not eliminating the danger, at least allowed some 'space' for activity and was a severe political defeat for the Colombian government, which vigorously opposed the application and denied any responsibility. The ability, experience, and success, of Colombian human rights organisations to prepare cases for these processes is a great source of concern for the Colombian government.

More traditional international trade union activity was also developed alongside the Central Unitaria de Trabajadores de Colombia (CUT) (the biggest of the national trade union federations) and other national trade union organisations. With the backing of the British TUC, it has also put forward motions for the last several years at the annual ILO conference in Geneva to call for a 'Special Commission of Inquiry' into the human rights emergency for Colombian workers. The motion was finally accepted in 2006. The human rights department has also been a fundamental catalyst in building transnational links with trade union, solidarity and other activist organisations in the North. In the United Kingdom, strong international links began during Alexander Lopez's brief period of exile in London from October to December 2000. Since then, there have been delegations, exchanges, and several invitations for SINTRAEMCALI representatives to talk at trade union conferences. SINTRAEMCALI forged strong links with the Colombia Solidarity Campaign, UK, which campaigns on human rights and political issues in Colombia, and several of its members have worked as volunteers in the human rights department of the union. Since 2000, there has been a continual process of communication and regular delegations that have forged strong bonds between individual Colombian and British trade union and political activists. This strategy has extended more recently to Spain, Canada, the USA, and Australia and includes links with sympathetic politicians, human rights groups, NGOs and social movements in each of these countries. The rapidly expanding Colombian exile community in these countries has strengthened the transnational links and many are founding members and activists in solidarity organisations, as is the case in the UK.

Within the development of solidarity with SINTRAEMCALI we can see the range of solidarity actions operating in both the more traditional forms and models of international trade union activity and the 'new' labour internationalism, anti-capitalist and human rights domains:

In the last three years we have had ten international delegations: Amnesty International, American Watch, who carried out important work in verifying

denouncements of human rights violations, three UK delegations of trade union leaders, in which organisations such as the UNISON, FBU, ASLEF, Colombia Solidarity Campaign and War on Want have participated. Two delegations from the Spanish, Red de Hermanidad (Brotherhood Network), one Canadian delegation, another Spanish one and one mission from Public Services International which included 12 delegates from different countries, and most recently a delegation from Austria. We have seen the strengthening of this accompaniment, beginning initially with trade unions from England and later on from a range of European countries, the United States and Canada. We have received humanitarian support, and emergency funds in those moments of serious crisis from UNISON, the FBU, the TUC and War on Want. We have also been present at the World Social Forum in Porto Alegre and at the European Social Forum in Firenze.

(Interview with Berenice Celeyta, 2003: 6)

The human rights department has provided a permanent point of contact for all this international work. This involved coordinating activities with international organisations, producing and disseminating videos, reports, and urgent actions. The vast array of contacts and the experience that Berenice Celeyta, the prominent Colombian Human rights activist, has brought with her has ensured that the union capitalised on the potential interest of the international community in the situation of Colombia.

The human rights department provided the technical skills to improve the capacity of SINTRAEMCALI to challenge the Colombian state at a range of levels from local legal processes to the IAHRC. Central to this strategy was the need to create the necessary skills, knowledge and materials able to operate effectively in these new solidarity and human rights spaces. The human rights diplomas provided the skills for trade union and community activists, the production of videos, the detailed collection of human rights testimonies and the support for delegations both to and from Colombia all reflected the trade union's commitment to educating both their own members in human rights and the international community of trade union and political activists about what was taking place in Cali and in Colombia more generally.

Spaces of solidarity in action

Returning now to the 36-day occupation of the headquarters of EMCALI, what we saw is how these different spaces of solidarity operated together to produce more than the sum of their parts. The trade union/community alliance mobilised on a massive scale on several occasions and provided a 36-day cordon around the occupation building. The militancy of the rank and file meant that the several hundred workers inside the occupation stood firm and managed the massive psychological pressure, fear and difficulties resultant from living in such cramped and difficult situations over the entire Christmas period when normally they would be with their families. The management space of the Plan PARE meant that the leadership had

an authoritative argument to counter the government's critique of the company in the media and the capacity to continue delivering public services throughout the duration of the occupation. Finally, the transnational solidarity space of human rights and labour rights ensured that the occupation became an international labour issue, that international trade union and human rights organisations were centrally involved, and that the Colombian government was deterred from acting more violently for fear of international repercussions. In combination, on that occasion, this all proved to be too much for the Colombian state which retreated to plan for the next confrontation.²

Conclusion

Central to the success of SINTRAEMCALI was the long and hard strategic work put into constructing these different 'spaces of solidarity'. Crucially, these processes extended out from the SINTRAEMCALI membership to local communities, activists and international actors. While SINTRAEMCALI leaders often articulate this in fixed scalar levels – the local, national and international – the concept of 'spaces of solidarity' allows us a way of pinpointing agency in these scales by focusing in on the particular groups and actors involved and understanding the processes through which they learned to act effectively and construct their spaces of solidarity. Crucially, it was not all the international community, national or local, but particular sets of people that carried out certain things, and their actions were linked in different ways.

Solidarity among the different groups was mutually constructed by the trade union leadership with their different allies. For the affiliates of SINTRAEMCALI this was a struggle for employment and labour rights, for the community this was a struggle for the defence of the local – against both a predatory state and foreign corporations. For national Colombian trade unionists it was a struggle for the 'other Colombia' not represented by national elites and another class struggle in a highly repressive society. For the international solidarity movements this was both a struggle against privatisation – that, for example, in the UK had been so badly lost – and also the defence of the basic human rights of workers in a pariah state where to be a trade unionist was akin to a death sentence. All of these different mutual 'framings' of the conflict allowed this struggle to break through the bounds of Hyman's 'mechanical' solidarity and draw in a range of solidarity commitments and actions from a wide range of actors. These varied 'spaces of solidarity' ultimately operated in coordination to successfully defend EMCALI from this attempt at privatisation and provided a new model of transnational protest rooted in different forms of solidarity.

Thinking beyond Colombia and more generally to workers' struggles, this protest episode highlights how labour can indeed operate beyond the local and build successful new alliances both beyond and with other labour movements (in both the community, the nation and in far off places). None of this, however, happens overnight and requires radical and fresh thinking, a new openness to engage beyond 'bread and butter' issues and mechanical solidarity, a willingness to take militant

action, and a desire to rekindle once again the utopian dreams of international solidarity.

Interviews

Interview with Alexander Lopez (2002), carried out by M. Novelli, March, 2002.

Interview with Asdrubal Gonzalo (2002), carried out by M. Novelli, March, 2002.

Interview with Berenice Celeyta (2002), carried out by M. Novelli, March, 2002.

Interview with Berenice Celeyta (2003), carried out by M. Novelli, June, 2003.

Interview with Luis Hernandez (2002), carried out by M. Novelli, March, 2002.

Interview with Nelson Sanchez (2002), carried out by M. Novelli, March, 2002.

Notes

- 1 For an analysis of human rights violations against educators during the same period see Novelli (2009) *Colombia's Classroom Wars*. Brussels: Education International.
- 2 See Novelli (2004a) for a much deeper coverage of this whole issue, Novelli (2004b) for an emphasis on the learning and pedagogical processes, Novelli (2007), for a stronger political economy analysis located in research on social movement unionism, and Mathers and Novelli (2007) for a reflection on methodological issues related to researching radical social movements. The research was based on a four year Economic and Social Research Council-funded study between 2000 and 2004.

Part V

Trade union: social movement cooperation in the developed world

12 How new social alliances changed politics in Norway

Asbjørn Wahl

In spite of the neo-liberal offensive, trade unions and social movements in Norway have experienced some successes over the last years. New and untraditional alliances have been built. New working methods have been developed. Some important victories have been achieved. The new alliances have even been able to push the social democratic party to the left in some important areas. In 2005, these alliances replaced the most neo-liberal, right wing government ever in Norway with a centre-left government, involving the Labour Party, the Centre Party¹ and the Socialist Left Party. The political platform of this coalition government is probably the most progressive in Europe today.² Under the current unfavourable balance of power in society, this represents important achievements. It can therefore be useful to take a closer look at what has taken place, what has been achieved, and what can be learnt from the concrete experiences – be they good or bad.

The political context

When new tendencies started to develop in the trade union movement during the 1990s, also in Norway the political situation was characterised by the ongoing neo-liberal offensive. Privatisation and competitive tendering were high on the agenda. Public services were under attack. The trade union movement was on the defensive. Deregulation and widespread attacks on trade union and labour rights were met by retreats, among other things by bargaining concessions and by giving up positions at the negotiating table. A relatively de-politicised, de-radicalised and bureaucratised labour movement was taken by surprise by the neo-liberal offensive, and the ideology of the social pact was not able to explain the new confrontational policies from the capitalist forces (Wahl, 2004). The result was great ideological confusion and backlashes. The ‘reality oriented’ social democratic leadership followed the dominant political trends and adopted many of the neo-liberal ideas. In Norway, the peak was reached when a Labour government in 2000–2001 carried through some of the most extensive market reforms in modern time, when the state telecom company (Telenor) as well as the state oil company (Statoil) were partly privatised – and the entire hospital sector was restructured into a new market oriented model. At the same time, the Labour Party gave way to competitive tendering of public services at municipal level.

Reorientation of the trade union movement

In this situation some people in the trade union movement started to reassess their policies. The Norwegian Union of Municipal and General Employees and its President, Jan Davidsen, have played a decisive role in this development – in addition to a number of local trade union councils and branches. They acknowledged that the trade union movement was facing a new and defensive situation, and discussions started around new ways to meet and to stem the neo-liberal offensive. More or less clearly expressed, new goals were identified, which can be summarised in the following points:

- To stop the policy of privatisation.
- To change public opinion.
- To shift the political hegemony to the left.
- To push the social democratic party to the left.
- To create a centre-left majority alliance in Parliament.
- To change power relations in society.

In other words, it was no longer only a question of a narrowly focused trade union struggle, but also a more comprehensive ambition to change society. Not least the move to the right of the social democratic party made it necessary for the trade union movement to take on a broader political responsibility. The situation required renewal – organisationally as well as politically. Different currents and initiatives on the left, in the Norwegian trade union movement, as well as in allied movements, have in many ways followed this path, and, assessed retrospectively, we can identify four main pillars which have contributed to the positive results:

1. Focus on alternative analyses – a more critical view of current developments.
2. The building of new, broad and untraditional alliances.
3. The development of concrete alternatives to privatisation and marketisation.
4. The development of trade unions as more independent political actors.

In the following, I will describe each of these four pillars and examine what has been achieved as a result of this reorientation of parts (still a minority) of the trade union movement – as well as among allied forces and movements. Finally, I will assess the strengths and weaknesses of the alliances and policies which were developed.

More critical analyses

A thorough analysis of current economic and social relations is important, since it is decisive for the development of strategies and alternatives. Therefore, the new alliances developed analytical documents, organised widespread general education projects to spread knowledge of what the global, neo-liberal offensive really is about. The question of social power was focused, and it was stressed that behind the

apparently neutral notion of globalisation, an enormous interest-based struggle was going on (Harvey, 2005). In the current situation, this struggle, through deregulation, privatisation and market orientation, was undermining democracy and leading to an enormous shift in the balance of power in society (Wahl, 2009b).

There were, of course, internal political and ideological struggles over this – inside the trade union movement as well as on the political left. The neo-liberal account of *globalisation* as a necessary and unchangeable process, most strongly expressed through Madam Thatcher's '*there is no alternative*' (TINA), gained a foothold also in great parts of the trade union movement as well as in traditional political parties of the left. *Globalisation has come to stay*, became an often expressed statement, and the trade union movement would have to accept this fact and adapt to it. Increased competitiveness thus became the most important way to secure jobs. Policies of privatisation in the same way were interpreted as a *necessary modernisation* of an old-fashioned and bureaucratised public sector. This apprehension was rejected by the municipal workers' union and many of the other alliances and initiatives which developed. Through the production of small booklets, the organisation of conferences, participation at countless meetings and arrangements in other organisations, as well as in the general public debate, the Campaign for the Welfare State alliance (see below) painted another picture, focusing on the question of social power, resistance and alternatives.

Broad social alliances

The comprehensive change in the balance of power in society also led to the realisation that it was necessary to build new, broad and strong alliances – inside the trade union movement as well as between trade unions and other organisations and movements. As mentioned by Bieler and Lindberg in the introduction to this book (Chapter 1), the objective conditions for cooperation between trade unions and social movements exist as a result of neo-liberal restructuring, but cooperation will not follow automatically. Through conscious political initiative, however, the Campaign for the Welfare State³ was set up. The alliance was established in 1999 when six national trade unions in the public sector, inside and outside the dominant Norwegian Confederation of Trade Unions, joined forces to fight the ongoing attacks on public services.⁴ The Norwegian Union of Municipal and General Employees was the initiator, and the six unions were later on followed by another nine – most of them from the private sector – as well as a farmers' union, a national association of retired persons, women, student and user organisations. At its height, this alliance united 29 national organisations which together represented more than one million members (in a country with about 4.7 million inhabitants).

Alliances were built in other areas as well. As the financial situation of the municipalities became more and more constrained as an effect of a comprehensive redistribution of wealth from the public to the private sector during the 1990s,⁵ widespread discontent developed among local politicians. Petitions from an increasing number of mayors and protest meetings were repeatedly organised against the annual state budgets. The Campaign for the Welfare State considered

the situation to be ripe for a more extensive organisation of the opposition. In 2002, this alliance, together with a number of mayors and local popular movements,⁶ therefore took the initiative to organise the Popular Movement for Public Services. A coordinating committee was set up, including representatives from all the groups involved. Within one year, 90 of the about 430 municipalities in Norway had joined the action. This was the first time that municipalities had organised in an action outside the formal structures (the Norwegian Association of Local and Regional Authorities is their professional body), and it contributed strongly to increasing the pressure on the national government and parliament.

Before the fifth Ministerial of the World Trade Organization in Hong Kong in December 2005, the Campaign for the Welfare State initiated a broad alliance of organisations with more than 800,000 members, in support of a statement which demanded a break with neo-liberal trade policies. Trade unions and farmers' organisations bore the brunt. This was later followed up through the establishment of the Norwegian Trade Campaign network. Several years earlier many of the same driving forces had been involved in the setting up of the Norway Social Forum – as the Norwegian part of the new global justice and solidarity movement against neo-liberalism and war. Through these alliances, processes were developed which further radicalised participants. This underlines the point made by Bieler and Lindberg (Chapter 1) that solidarity is not static, and that identification with others, as a basis for a solidaristic relationship to others, can be both broadened and deepened through intensified human contacts.

The initiative to create a parliamentary alliance between the Labour Party, the Centre Party and the Socialist Left Party was also taken by these new social alliances. The Labour Party had never ever been in a coalition government, and until as late as one year before the parliamentary elections in 2005, the Labour leadership rejected the entire possibility of forming a coalition government together with the Socialist Left Party. It was the trade union movement which pushed this through, not least because, as time went by, also the national confederation of trade unions threw its strength behind the project. In 2001, a majority at the trade union congress decided to support financially not only the Labour Party, but also for the first time in history the Socialist Left Party – against the recommendation of the Executive Board. At the next congress, four years later, even the leadership had changed its political position on this question, and the leader of the Socialist Left Party was invited to speak to the congress. The municipal workers' union started to hold contact meetings both with the Socialist Left Party and the Centre Party, in addition to the Labour Party. Together with increasing scores for the Socialist Left Party in opinion polls at that time, this created strong pressure on the Labour Party leadership.

In Oslo, another alliance was created before the 2005 parliamentary elections – focusing on the need for a new political course.⁷ A wide variety of organisations took part: the local trade union council, Attac Norway, the Campaign for the Welfare State, the Norwegian Council for Africa, the Committee for Solidarity with Latin-America, the youth organisation of Save the Children and another couple of local trade unions. Under the umbrella of *Oslo2005* these organisations joined

forces in demanding a break with neo-liberal policies which had been pursued by all governments, irrespective of right or left, over the last 20–25 years. No particular political party was supported, but the necessity of a new political course emphasised.

Alternatives to privatisation

When the attacks on public services started in the 1980s, neo-liberal politicians exploited the discontent which already was prevalent with existing public services, linked to bureaucratisation, low quality or limited accessibility. The defenders of public services found it important to admit these weaknesses, and therefore to fight for *improved* services, but without giving way to neo-liberal reforms. This was done by a strong and principled stand against privatisation and competitive tendering, while at the same time they said yes to reorganisation and development of public services based on their own premises – and within the public sector. In the political climate which existed at that time, this was not an easy position to carry forward. Market solutions were *in*, and competitive tendering had come to stay, they were told. Trade unions were advised by people inside the trade union leadership and the Labour Party that they should focus on securing wages and working conditions, as well as trade union rights, within the tendering system. The new alliances rejected this position. Their view was that it was deregulation and privatisation itself that posed the threat, which undermined working conditions. These developments were part of neo-liberal globalisation, in which exploitation was extended into the sphere of social reproduction, as stated by Bieler and Lindberg (Chapter 1). This clear principled stand led to the situation that the municipal workers' union, as well as its president, over a long period of time, was systematically abused in editorials in dominant newspapers.

However, the union did not limit itself to this defensive struggle. It also took the initiative to a more offensive effort – through the so-called Model Municipality Project. The union entered into three-yearly agreements with a number of municipalities with sympathetic, political majorities. The aim was to mobilise the employees to further develop and improve the quality of the public services – under the following three preconditions: no privatisation, no competitive tendering and no dismissals should take place. The project was based on a bottom-up process, where the experiences, the competence and the qualifications of the employees formed the basis, together with the experiences and needs of the users of the services. Two independent research institutions followed the first model municipality (Sørum) and concluded that the project had led to higher user satisfaction, better working conditions for employees and a better financial situation for the municipality – a win-win-win situation.⁸ More than anything else, this proved that the policy of privatisation was not primarily about improving public services, it was a political-ideological struggle to change society in the interest of market forces. The new centre-left government, which won power in 2005, then adopted the Model Municipality Project as government policy by launching in the autumn of 2006, the so-called Quality Municipality Project. Indeed, it represents a modified

version of the Model Municipality Project including the aim to increase the quality of local public services and strengthen local democracy – without privatisation and competitive tendering. This was an important victory for the fight against privatisation in Norway.

More politically independent trade unions

Finally there is the example of Trondheim (Etzler, 2007: 70–82), which inspired the new alliances of the left greatly in the struggle against neo-liberalism. Before the local elections in 2003, the trade union council of Trondheim, together with its allied partners, broke with an old trade union tradition. Usually trade unions' role during election campaigns had been to support political parties on the left (most often the Labour Party) and the political programmes on which they campaigned. Before the 2003 elections the local trade union council turned into an important political actor itself. Through a comprehensive, democratic process, 19 concrete demands were developed on how Trondheim should be governed in the coming four years. The demands were sent to all political parties with the following message: we will support those parties which support our demands. This had a strong educational effect on a number of the political parties, not least the Labour Party, which hardly could stand to lose the support from the trade union movement.

The new initiative in Trondheim received positive answers from the Labour Party, the Socialist Left Party, The Red Electoral Alliance, The Greens, the Pensioners' Party and a local list. The Centre Party supported about half of the demands and it was kindly included as a supportive party. Subsequently, the trade union alliance urged its members and the voters to vote for *one of these parties*, at the same time as it continued to campaign for its own political platform (the 19 demands). The traditional financial support from the trade union council to the Labour Party was later on cancelled, since the resources were rather used for its own campaigns. Thus, a more politicised trade union movement was decisive in revealing the real political contradictions in society, as well as pushing the Labour Party and other, smaller parties, to the left. The Conservative Party, which had dominated this third biggest city in Norway during the last 14 years, became the main loser in the election. The trade union initiated political alliance won a clear victory with more than 60 per cent of the votes. The three parties linked to the labour movement, the Labour Party, the Socialist Left Party and the Red Electoral Alliance alone achieved a majority of the votes (51 per cent). Those three, together with the Greens, and with solid representation from the trade union movement, worked together to develop a joint political platform for the new majority. They were later also joined by the Centre Party on a platform which included most of the 19 demands from the trade union alliance.

This political platform was not only about abolishing the policy of privatisation, but also about taking back into public sector services that had already been privatised. So far, the result of this has been that two nursing homes and half of the refuse collection services in Trondheim, which had been privatised through tendering under the previous, conservative majority, now have been taken back into the

public sector. The same has happened with the maintenance of public buildings. Social benefits have been increased, public transport fares have been reduced and an extensive maintenance and new construction programme of public schools has been introduced. Through an agreement with the municipal workers' trade unions, Trondheim, moreover, joined the growing number of model municipalities.

Before the parliamentary election in 2005, the Norwegian Confederation of Trade Unions (LO is the Norwegian abbreviation) partly followed up on this model. A comprehensive project, '*You decide – LO on your side*', was developed in order to collect the demands and priorities of the members. 155,000 proposals from 44,000 members were received. Fifty-four concrete demands were identified and sent to all political parties. Their answers were collected and sent to all 800,000 members at the same time as LO, through 'the long electoral campaign',⁹ mobilised for a new political course, including a majority for a coalition government consisting of the three parties: The Labour Party, the Socialist Left Party and the Centre Party – which also won a majority.

So what have the new alliances achieved?

Alliance building, alternatives to privatisation and more politicised trade unions represent the new developments which have contributed most to the important changes on the left in Norway over the last few years, and which has led to some important political victories. The new alliances have been able to change public opinion, from a situation in which about half the population was in favour of privatisation in the middle of the 1990s till almost 70 per cent were against in opinion polls before the elections in 2005. This contributed strongly to moving also the Labour Party from a pro-to an anti-privatisation platform in the same period. The alliances have increasingly been able to expose the real contradictions in society and to sharpen the political/ideological debate – even to the degree that, when the Conservative Party were to proclaim its main opponent in the local elections in 2003, it pointed to the Norwegian Union of Municipal and General Employees, which obviously did not stand for election, but which the party anyway correctly saw as the main barrier against its neo-liberal offensive. It was a brilliant situation for the trade union, of course, which in this situation even to a greater extent than before could define the premises for the political debate. Both in the Trondheim example and in the parliamentary elections in 2005 one experienced stronger than usual political polarisation between the right and the left in Norway. These experiences have in practice confirmed that it is when the political alternatives stand clearly against each other, when the real contradictions in society are exposed, that the left can most successfully mobilise. The simplistic comprehension that if voters move to the right, the left parties have to go to the right as well in order to catch the voters in the centre, has in other words been proven wrong. Political movements are not linear. It is rather a question of conflicting interests, as well as political-ideological awareness.

Over the last few years, the new alliances, through the politicisation of trade unions and the development of alternatives, have been able to slow down, and

partly stop, the policy of privatisation. They also got rid off the most right wing, neo-liberal government ever in Norway. It was replaced by a centre-left government after the elections in 2005, when all the three political parties had to campaign on an anti-privatisation platform, not least because the new alliances had succeeded in changing public opinion, heavily supported by the fact that privatisation was no longer only an abstract promise, but concrete experiences, which did anything but meet the rosy expectations which had been created by the neo-liberals. It was also important that the Labour Party experienced a formidable electoral defeat in 2001, when it was punished by the voters for its neo-liberal development in the previous period. The party's score was reduced from 36 (in 1997) to 24 per cent, the lowest ever since the beginning of the 1920s. The demand for a new political course therefore also received strong support from great parts of the party's own rank and file. By moving politically to the left in the 2005 elections, the party recovered many of its voters. The political platform of the three-party coalition government was in many areas surprisingly radical in its contents.¹⁰ The government's *morning gift* to its people consisted in the redemption of a number of the most important demands which were raised by the trade union and other movements. The serious weakening of the labour laws, which had been carried through by the previous government, was reversed. The full opening for private primary and secondary schools was stopped.¹¹ The privatisation of the railways was stopped. Billions of fresh money was put into the municipalities, which carry out most of the public services. Demands on a number of developing countries to liberalise their services sectors through the WTO GATS agreement were withdrawn. And Norwegian soldiers were withdrawn from Iraq.

New political course?

After this morning gift, however, it has, with a few exceptions, been difficult to catch sight of the new progressive political course in Norway. The Labour Party's right wing has regained the initiative, while the Socialist Left Party shows all its weaknesses – among them a lack of insight into basic power structures in society. The party obviously does not have any well developed strategy for their participation in government. The matters on which the party has chosen to make a stand in the coalition government so far have concentrated on foreign policy and environmental questions, while the social struggle is more or less absent as a subject, in spite of the fact that the poverty gap is still growing and social dumping and anti-trade union policies are on the increase. This lack of roots in the social movements and in the social struggle is the main weakness of this political party. The building of alliances with social movements outside parliament is therefore also non-existent. The party leadership rather encourages people to stay calm, '*so that we can carry out our policies*'. Even if the centre-left government is still able to carry through some progressive decisions (see below), it seems as if the limit is where it will have to confront strong economic interests. Structural reforms, which can contribute to shifting the balance of power in society, are therefore missing. It looks as if the government defines a new political course, not as a comprehensive

new approach to politics, but as a list of single issues which will be implemented (if possible?), while politics at large will continue as before along a soft, neo-liberal path. For example, the government has just recently been pushing through a pension reform which will weaken the existing, redistributive pension scheme. It has also proposed a regional reform, in which it fails to take the opportunity to structurally strengthen and consolidate local democracy.

For quite many in the new alliances, it was clear from the outset that the new centre-left government would only represent an opportunity, but real developments would depend on a strong and continuous pressure from outside parliament. There are many reasons for this. First, power has been transferred from democratic bodies to the market in the neo-liberal era. Second, the political space has also been reduced through a number of international agreements over the last 10–15 years, where the European Economic Area (EEA)¹² and the WTO agreements are the most important ones. Third, the pressure from the political right and capitalist interests is strong, and the government gives way. Fourth, the right wing still holds the most important positions in the Labour Party, while the Socialist Left Party neither has the strategic perspective, nor the social roots which are necessary to pose an alternative stronghold on the left. The party political misery on the left has in other words not been overcome (Wahl, 2009a). So far it is therefore the right wing populist party (*The Progress Party*) which has been the big winner in the opinion polls since the centre-left government took office in Norway. Neo-liberalism creates a real basis for anxiety, discontent and contradictions in society. The right wing populists have specialised in exploiting all such discontents in channelling it in their particular political directions (against immigrants, against single mothers, against people on social benefits, against ‘politicians’, etc.) (Marsdal, 2007). The only way to challenge this situation is through policies from the left parties which take people’s discontent seriously, politicise and channel it into a social struggle for collective solutions.

Strengths and weaknesses

The centre-left government’s problems in following up on its radical political platform not only reveal weaknesses of the political parties involved. It also exposes weaknesses of the new tendencies in the trade union and other social movements. The alliances which succeeded in making the new coalition government come to power, have not been strong enough to keep up the pressure and hold the government accountable to its own radical aims. The implementation of new more left-oriented policies will, however, completely depend on such a pressure in the current political situation (Wahl, 2009c: 36–38). Important bits of alternative political analyses as well as new political thinking have been developed, but there is no consolidated tendency with a sufficient clear and developed political message – not to mention programme. The move towards more party political independent trade unions also has shown its limitations, particularly in the trade union leadership when the Labour party tries to discipline its close allies by demanding loyalty. Although these loyalties are weakened, they still dampen the ability as well as the

willingness to take action from below. The increased strength and the broader unity in the trade union movement were created while in opposition to the aggressive policies of the previous right wing government. However, it proved to be easier to develop unity on a radical platform against a right wing government than to maintain this unity under a social democratic dominated government. The unity was therefore weakened as soon as the centre-left government started to provoke confrontations with all or parts of the trade union movement. Then contradictions started to develop between those who wanted to defend the new more radical political course which was achieved during the election campaign, and the more moderate wing which programmatically defends the policy of the Labour party at any time.

While the left was on the offensive before, during and immediately after the election campaign, the more moderate tendencies have gained ground thereafter. During the resulting internal struggles in the trade union movement, the President of the Norwegian Confederation of Trade Unions (LO) was forced to step down in 2006 after a dramatic process which was triggered off by an internal personnel conflict (Tranøy, 2007). She had, in a couple of important cases, pursued a more independent political position in relation to the Labour Party, also by forcing the party and the centre-left government to retreat on a couple of occasions. Her resignation has, therefore, had important political implications in changing the balance between the right and the left in the trade union movement. The enthusiasm which was created in big parts of the trade union and labour movement during the election campaign in 2005, and by the fact that the government met the most important demands of the trade union movement immediately after the election has, thus, cooled off as time has passed by. For a long time, the government has scored low in opinion polls. This happens in spite of the fact that the centre-right political parties are split and are not able to come up with a unified alternative to the current centre-left coalition. The government still carries through policies which are in the spirit of its radical platform: securing national and democratic control of hydroelectric power; introduction of the main contractors' liability for employees in sub-contracting firms as an important means in fighting social dumping; cancellation of developing countries' illegitimate debt to Norway; recognition of the democratically elected Hamas government in Palestine. On the other hand, the real struggle against poverty has failed to materialise, the social and economic inequalities are growing, the social housing policy is still lacking and there is no attempt to limit the increased power of the big companies, as was promised.

At the parliamentary election in September 2009, the centre-left government was able to retain its majority, although only just. The trade union movement and alliance partners were once again decisive for the success. However, the situation had changed. This time the centre-left parties did not offer their supporters an offensive welfare programme on which they could mobilise. The enthusiasm which was created in 2005 through the radicalisation of the Labour Party and the campaign for a new political course had to a large degree vanished. The offensive campaign of 2005 was, thus, replaced this time by a defensive campaign, in which the driving force for the trade unions became to prevent a government based on

the Conservative Party and the Progress Party to take office. The chaos among the centre-right political parties, which were not able to come forward with a joint government alternative, contributed strongly to the victory of the centre-left. The result was a very narrow majority, a small increase for the Labour Party and a loss for the Socialist Left Party – in other words, a further small step to the right by the government coalition. The composition of the new government as well as some of its most recent initiatives only confirms this move to the right.

These developments also prove the weaknesses of the trade unions and the alliances. However, in spite of the current problems, the broad left in the trade unions as well as in other social movements still thinks that what they have developed in terms of new alliances, methods, alternatives and political independence over the last few years represents important steps in the right direction. Important victories have been won and the setbacks which they have experienced do not reduce the importance of the role these alliances have played. On the contrary, these developments underline the need to strengthen them further, make them more politically independent and to learn from their mistakes and problems. New initiatives are therefore being discussed within these groups. The aim of these initiatives is three-fold, first to push the centre-left government coalition to the left (again), second to create new enthusiasm among their own rank and file, and third to build broader alliances with groups and movements outside the trade unions. This is now considered to be decisive by many, if a victory of the political right is to be prevented at the next crossroads.

Notes

- 1 The Centre Party is a peasants' or a rural party, which has been radicalised by being one of the leading forces in the successful campaigns against Norwegian membership of the European Union (in 1972 and 1994).
- 2 The real experiences with this government, however, are mixed, as will be shown later in this article. A more detailed analysis can be found in my article 'Left Parties in Government: The Norwegian Case': http://www.rosalux.de/cms/fileadmin/rls_uploads/pdfs/Themen/Sozialforen/ESF_2006/Wahl_left-parties.pdf
- 3 See www.velferdsstaten.no. The author of this article has been the national co-ordinator of this alliance ever since the beginning.
- 4 In addition to the Norwegian Union of Municipal and General Employees, the following unions took part: Norwegian Civil Service Union, Norwegian Union of Social Educators and Social Workers, Norwegian Union of Teachers, Norwegian Nurses Association and Norwegian Association of Health and Social Care Personnel. The three first mentioned were affiliates of the Norwegian Confederation of Trade Unions. The nurses' union was affiliated to the Confederation of Academic and Professional Unions, while the teachers' union was not affiliated to any confederation. The last mentioned union was affiliated to the Confederation of Vocational Unions, but it has later on merged with the municipal workers' union.
- 5 The public sector share of the Gross National Product was reduced from 52 to 43 per cent from 1992 to 1998 in Norway.
- 6 In 2000–2001 local movements developed both in Finnmark and in Nordland (two counties in the North of Norway) fighting the effects of neo-liberal policies.
- 7 The term 'a new political course' has been used a lot by the left in Norway over the last few years to demand a change of politics – away from neo-liberalism with deregulation

and privatisation, towards progressive policies with increased democratic control of the economy. It includes a criticism of social democratic as well as right wing government policies, which in reality did not differ that much during the 1980s and 1990s. It is with this meaning the term is being used in this article.

- 8 Information on the Model Municipality Project can be found at <http://www.fagforbundet.no/omstilling/>. Choose the key word '*Modellkommunemetodikken*' on the left margin and on the new page you will also find some documents in English.
- 9 It started a year before the elections and was named 'the long electoral campaign' by LO itself.
- 10 Only the foreign policy part of the platform is available in English: <http://www.regjeringen.no/en/dep/smk/Documents/Reports-and-action-plans/Rapporter/2005/The-Soria-Moria-Declaration-on-Internati.html?id=438515>
- 11 Most schools in Norway are publicly owned and managed. Only schools linked to alternative faiths or alternative pedagogies are allowed. The previous government, however, carried through a new law which gave free way to the establishment of private schools based on the same curriculum as publicly managed schools.
- 12 The EEA is an agreement between the EU and Norway, Iceland and Liechtenstein which makes these countries part of the Single Market – with some limitations regarding agriculture, fisheries and foreign policy. The agreement came into effect on 1 January 1994.

13 Trade union and social movement cooperation in the defence of the European public sector¹

*Andreas Bieler, and a postscriptum
with Jan Willem Goudriaan*

Introduction

As outlined in the Introduction to this volume (Chapter 1), neo-liberal globalisation has, first, intensified exploitation in the production process through an increasing transnationalisation of production and the related downward pressure on wages and non-wage costs. This has been further intensified through an ever larger informal sector of the labour market. Second, neo-liberal globalisation has extended exploitation into the sphere of social reproduction including an increasing commodification of areas such as health, education and social services. It has also been noted how this provided the objective conditions for closer cooperation between trade unions and social movements/NGOs in their struggles against restructuring. Whether this materialised in practice, however, would depend on open-ended class struggle.

The European Union (EU) has been part and parcel of neo-liberal globalisation since the mid-1980s and the increasing restructuring around the four freedoms of the Internal Market, the convergence criteria of Economic and Monetary Union (EMU) as well as the almost exclusive focus on competitiveness within the Lisbon Strategy (Bieler, 2006: 9–14; Hager, 2009). The so-called Social Dimension of the EU provides flanking social measures at best, some even describe it as part of the market building process (Leibfried, 2005: 257, 262). Since its establishment in 1952, the EU has emerged as a state like structure with its own state project as the result of an increasing institutionalisation of policy-making at the European level. European integration focused initially on economic concerns, but over the years its competencies have been further extended into new areas including agriculture, social policy, monetary policy, environmental concerns and industrial relations. Unsurprisingly, the EU has increasingly become an additional arena for contesting policy-making for representatives of capital, but also trade unions and social and environmental NGOs and movements (Greenwood, 2007). Thus, it is important to analyse policy-making within the EU and assess whether new forms of alliances may be in a position to challenge neo-liberal restructuring successfully.

The purpose of this chapter is to analyse the Coalition for Green and Social Procurement, an alliance of European trade unions and NGOs, and its campaign for an amendment of the new public procurement directives from 2000 to 2003.

The draft directives, published by the Commission in May 2000 (Commission, 2000a, 2000b), focused primarily on the lowest price as main criterion for awarding public contracts, sidelining green and social criteria. The traditional concept of procurement which allows governments to participate in the market as purchaser but also to regulate it and promote social justice and sustainable procurement, linking social and environmental concerns (ILO, 2008b: 10; McCrudden, 2004) is anathema to the neo-liberal policy focus of the European Commission. Next to the Services Directive, the public procurement directives constituted the direct attempt to restructure parts of the public sector by establishing an exclusive focus on price competitiveness in increasing the involvement of the private sector in the provision of public services. As Hay makes clear, it is this privileging of price competitiveness, which ‘threatens the viability of the distinctive social and economic paradigm to which the EU ostensibly remains wedded in its conception of a “European social model”’ (Hay, 2007: 26). In this chapter, it will be analysed to what extent this campaign was able to change the directives and counter neo-liberal restructuring effectively.

The struggle over the directives on public procurement²

Trade unions and social movements had attempted to influence the policy-making process already at the drafting stage by the Commission (e.g. The European Federation of Building and Woodworkers (EFBWW), 1997; European Federation of Public Service Unions (EPSU), 1998) in response to the Commission green paper on public procurement on 27 November 1996 (Commission, 1996) as well as the related Communication by the Commission in March 1998 (Commission, 1998). The European Parliament did recognise the concerns of the unions, explicitly so both in the opinion of the Employment and Social Affairs Committee (Van Lancker, 1998) as well as in the final resolution of the European Parliament by its draftsman (Tappin, 1998). It says that it

notes the Commission’s intention to interpret the basic principles for the consideration of social aspects in public procurement contracts in an interpretative communication; nevertheless calls urgently for binding legislation at European level to ensure compliance with social legislation by all suppliers, including subcontractors, in the context of procurement procedures in order to prevent unhealthy competition with regard to the price of labour or other terms and conditions of employment; calls on the Commission, *in future directives on public procurement, also to include provisions permitting social clauses to be included in contracts, in order to enable purchasers to develop positive action in employment and to promote social objectives* [emphasis added].

In the end, the lobbying did not prove very successful. When the Commission published the draft directives in May 2000, little concrete reference was made to social and environmental criteria (Commission, 2000a, 2000b). Unions had been successful at lobbying the DG for Employment and Social Affairs and the DG for

Environment. Nevertheless, within the Commission it was the DG for the Internal Market, which was in charge of the directives, and it chose to disregard the views of the other two DGs (Interview No. 1). It was in response to the draft directives that the Coalition was formed and social and environmental NGOs cooperated closely with trade unions.

The main initiators behind the coalition were EPSU (<http://www.epsu.org/>; 02/11/2007) for the unions and the European Environmental Bureau (EEB) (<http://www.eeb.org/Index.htm>; 02/11/2007) for environmental NGOs. Additional coalition members were the European Disability Forum (EDF) (<http://www.edf-feph.org/>; 02/11/2007), the Social Platform (<http://www.socialplatform.org/>; 02/11/2007) and the WWF-European Policy Office (Interview No. 1; Interview No. 3; Interview No. 6; Interview No. 7; Interview No. 9). The coalition was further supported by fair trade associations (Interview No. 1), the Climate Action Network Europe (<http://www.climnet.org/>; 02/11/2007), the social NGO Solidar (<http://www.solidar.org/>; 02/11/2007) as well as the Clean Clothes Campaign (CCC) (<http://www.cleanclothes.org/>; 02/11/2007). Importantly, there was also support by organisations representing municipalities especially prior to the second reading in the EP on 2 July 2003 (Document No. 24; Document No. 26). This included the Council of European Municipalities and Regions (CEMR) (http://www.ccre.org/presentation_en.htm; 16/10/2007), Eurocities (<http://www.eurocities.org/main.php>; 16/10/2007) as well as the Climate Alliance (Interview No. 7; <http://www.klimabuendnis.org/english/update/frameset.htm>; 02/11/2007). Finally, there were contacts between unions and the European Centre of Enterprises with Public Participation and of Enterprises of General Economic Interest (CEEP) (<http://www.ceep.org/>; 02/11/2007), but the latter did not join the Coalition, since many of its demands were regarded as additional cost factors for public companies (Interview No. 8).

The general criticism of the draft directives by the Coalition was 'that the principle of the lowest price will be the criterion most used for awarding contracts' (Coalition for Green and Social Procurement, 2002a: 1). As a result, 'criteria relating to the production and trading process of the product cannot be taken into account, if they are not visible in the end-product. In practice, this will exclude environmentally, socially and ethically sound public procurement for many products and services subject to public tendering' (Coalition for Green and Social Procurement, 2002c: 2). In a joint statement by four environmental NGOs, all coalition members, the EEB, Greenpeace, Climate Action Network Europe and the WWF, in November 2001, it is demanded that the whole production process is taken into account, not just the end product. 'In the life cycle of a production, it is often the PPM [process and production methods] that cause the major environmental impact and public purchasers should be permitted to take this into consideration when deciding on their selection criteria but also when awarding the contract' (EEB, Greenpeace, Climate Network Europe, WWF, 2001: 3). Additionally, it was criticised that green criteria had to have a 'direct link' to the contract excluding wider concerns such as global warming. In general, environmental NGOs pointed out that the new directives would make it more difficult to use green criteria when awarding public contracts (Interview No. 7; Interview No. 9).

The focus on the end product by the directives was also problematic from a social criteria point of view. The CCC works on the labour conditions in the garment industry and the related rights of workers and here too the process and production methods are an important aspect of award criteria, if one wants to ensure that local authorities only purchase ethically produced clothes (Interview No. 6). Fair trade organisations had similar objections (Interview No. 1). Hence, the Coalition demanded that the directives should include ‘respect for employment protection provisions and working conditions, collective as well as individual rights, e.g. as laid down in the ILO Convention’ (Coalition for Green and Social Procurement, 2002b: 1). It was especially the absence of labour standards amongst the criteria, which social NGOs such as Solidar objected to (Interview No. 5). This reflected the main concerns from a trade union point of view as outlined by an EPSU representative in an Email to a Swedish colleague: (1) the importance of a social dimension including the right for public authorities to demand compliance with collective agreements; and (2) the right for public authorities to provide services in-house, i.e. through their own companies/departments (Document No. 3). The second point provides a bridge to the CEEP’s concerns, which did not accept that a public tender is the only way of dealing with public services (Interview No. 8). The EDF, in turn, was especially pushing for issues such as the employment for people with disability and general issues of accessibility to public services to be included amongst the criteria (Interview No. 3), again something an exclusive focus on lowest costs would not make possible.

In sum, the main criticism of the Coalition was that the draft directives limited the possibility of using green and social criteria in the awarding of public procurement contracts (Coalition for Green and Social Procurement, 2002a: 1). The Coalition demanded that companies focusing on green and social criteria should be encouraged, not penalised (Coalition for Green and Social Procurement, 2002d: 1; see also Coalition for Green and Social Procurement, 2003a). The next section will assess to what extent the Coalition was able to push for changes in the draft directives during the policy-making stages.

The Coalition’s influence on the public procurement directives

The eventual directives, resulting from a conciliation committee meeting between representatives of the Council of Ministers and the EP on 2 December 2003 (EU, 2004a and 2004b), were disappointing for the Coalition. Despite the huge efforts made, there had only been limited success. Coalition members accepted that the situation had at least not gone worse, as they had succeeded in blocking the initial Commission drafts (Interview No. 9), but the main concerns – social and green award criteria, the applicability of collective agreements – were mainly relegated to the recitals – the official commentary on directives – and an additional Commission declaration (Interview No. 1). Several interviewees pointed out that the results were positive in that the directives made it possible that social and green criteria are considered. Nevertheless, they acknowledged that they had to be in direct relation

to the final product and not the process and production methods and that they are not obligatory for public authorities (Interview No. 3; Interview No. 6). Production methods and the tenderer's policy in relation to people with disabilities had also been transferred to recitals (Document No. 27).

Nevertheless, it would be incorrect to conclude from the final outcome that the Coalition had been ineffective and unsuccessful. On the contrary, it is a clear example of a tight co-ordination of a whole range of different organisations at the European level towards a joint lobbying campaign. At the centre of the organisation was EPSU, which organised the cooperation by regularly combining meetings of its Public Procurement Task Force, consisting of representatives of national affiliates, in the morning with Coalition meetings in the afternoon of the same day, thereby ensuring that internal trade union co-ordination went hand in hand with Coalition objectives (see, for example, Document No. 12; Document No. 18). The Coalition proved to be especially effective in co-ordinating the lobbying of the EP as well as its Legal Affairs Committee, in charge of preparing the plenary sessions. The first joint efforts were around lobbying the EP Legal Affairs Committee to delay the first EP reading of the directives until the Commission had published its Interpretative Communications on environmental and social criteria in public procurement (see, for example, Document No. 1; Document No. 2). EPSU combined this European level activity with a call to its Executive Committee members to write to their countries' MEPs on the Legal Affairs Committee as well as follow up public procurement issues with their governments (Document No. 7). The Coalition then turned its attention to the first EP reading of the directives on 17 January 2002 with a concerted effort of lobbying various individual MEPs (see, for example, Document No. 9; Document No. 10). Similarly, the EP Legal Affairs Committee was jointly lobbied prior to its meeting on 17 June 2003, preparing the second reading of the EP. Letters by the coalition and individual members were sent to MEPs on the Legal Affairs Committee (Document No. 20; Document No. 21) and EPSU urged its Public Procurement Task Force colleagues to send letters to their respective national MEPs (Document No. 22). Prior to the second reading of the EP, a meeting was organised with MEPs informing them about the concerns of the Coalition (Document No. 23) and a whole range of Coalition members lobbied MEPs personally prior to the reading in Strasbourg (Document No. 24). A public press release was further intended to focus MEPs minds in view of the second reading (Coalition for Green and Social Procurement, 2003a).

While the Coalition was not very successful at influencing the decisions of the EP Legal Affairs committee, which had a conservative-liberal majority, the EP itself, i.e. the decisive parliamentary body, did incorporate the Coalition's suggestions for amendments to a large extent. In its first reading on 17 January 2002, it incorporated green and social criteria as well as other Coalition concerns in the respective Article 53 of the classical directive (Document No. 11). In its second reading on 2 July 2003, it reconfirmed this position and, pretty much to the surprise of an European Trade Union Confederation (ETUC) representative, fulfilled all the objectives hoped for including dropping the reference to generally binding collective agreements in Art.27, a problem for unions since not all countries have

this provision,³ as well as getting rid of the very restraining wording of the award criteria in Art.53, which should not be 'directly linked' to the benefit of only the 'contracting authority' (Document No. 25). Environmental NGOs were equally satisfied with the EP, noting in a press release that 'today's plenary vote showed explicit support for the use of Eco-label standards, environmental characteristics relating to production methods, employment protection provisions and disability policy in public procurement' (EEB, Greenpeace, WWF, 2003). The success in the second reading is even more impressive, if one considers that amendments required an absolute majority of MEPs at this stage. In short, the failure of the Coalition to have a more decisive impact on the directives was not a result of having been ineffective in its lobbying of the EP.

There were clear tensions within the Coalition. In April 2002, a representative of one of the national member trade unions criticised EPSU for allegedly privileging cooperation with NGOs at the expense of pursuing trade union core business. More specifically, the lack of engagement in relation to Art.27 and the related EP amendment on generally binding collective agreements (Document No. 15) was pointed out. In response, an EPSU representative outlined in what way the unions were pushing this point mainly through the ETUC, while EPSU as such would concentrate on working with the Coalition and that these approaches were mutually supportive (Document No. 16). Nevertheless, the colleague developed the reasons for his critical position vis-à-vis the Coalition in July 2002. He argued that the different nature of green and social criteria would imply a slightly different interest between unions and environmental NGOs. To guarantee social aspects, it would be important for unions that social criteria are an aspect of application conditions at the very beginning, i.e. Art.27, while green criteria become crucial at the awarding stage of contracts, i.e. Art.53, considering that it cannot be easily answered whether green criteria are fulfilled or not (Document No. 19). Overall, however, these tensions within the Coalition are not surprising. Trade unions and NGOs have very different histories, internal structures and campaign strategies (Bieler and Morton, 2004). If there is a surprise then it is not that there were tensions, but that the Coalition functioned so well despite all possible conflicts and contradictions. The tensions as such cannot explain the failure of influencing the final outcome.

The explanation re the ultimate failure of the lobbying strategy lies in the institutional set-up of the EU, the important role of the Council of Ministers in decision-making combined with the difficulty, if not impossibility, to influence it. Trade unions and social movements are clearly disadvantaged within the structural selectivity of the EU and its neo-liberal state project, the way market-oriented DGs are dominant within the overall set-up of the Commission – also relevant here in relation to the unsuccessful efforts by unions (and the EP!) to influence the drafting stage of the directives (see above) – and the clear dominance of the Council of Ministers over the EP in the decision-making process, with the Council itself, similar to the European Council, being almost completely outside the influence of trade union and NGO lobbying (Bieler, 2009a: 238–39). The Coalition did attempt to influence the Council. For example, a letter was sent to all permanent representations in Brussels on 2 April 2002, indicating the problematic situation of

the EP amendment of Art.27 regarding 'generally binding' agreements (Document No. 14). There was also a meeting with a representative of the Belgian Ministry for Economic Affairs prior to the Internal Market Council meeting on 21 May 2002 (Document No. 17) as well as meetings with French and Dutch Coreper representatives (Interview No. 1). These initiatives to influence the Council indirectly were supported by public statements putting direct pressure on the Council. For example, the Coalition criticised the Council for blocking the will of the EP and pointed out that 'such practices by Europe's governments to support a narrow interest group of big businesses over legitimate societal demands undermines the confidence of Europe's citizens and does not bode well for the European elections' (Coalition for Green and Social Procurement, 2003b, p.2; see also EEB, 2003a, 2003b). The fact that these attempts were rather unsuccessful has to be related to the difficult situation of lobbying the Council, with different access points at national and European levels as well as differences in Brussels itself with the functional organisation of several parallel Councils, rather than to the ineffectiveness of the Coalition to organise joint lobbying efforts. An important lesson is that EU lobbying needs a national focus as well to influence the member state governments, an effort that will be more difficult now that the EU has 27 members.

In sum, a strategy which predominantly concentrates on the policy-making procedures within the EU implies a disadvantageous position for trade unions and NGOs from the very beginning. Nevertheless, while lobbying strategies within the EU institutional structure are disadvantageous, wider campaigns based on broad support putting pressure on the EU from the outside may be more successful. The fact that trade unions and social movements are structurally disadvantaged within the EU does not automatically imply that the European level is not an important strategic arena. In the conclusion, I will discuss to what extent the Coalition was able to move towards a broader political project in its efforts against the procurement directives.

Conclusion: the Coalition and wider strategies within the EU

The Coalition is a clear example of a successful initiative at developing a large, tightly co-ordinated lobbying effort by a range of trade unions and green and social NGOs in relation to specific EU directives. This success is best reflected in the high level of impact the Coalition had on the EP, especially in relation to its second reading of the public procurement directives. At the same time, it has also been shown that ultimately the impact on the eventual directives was rather small. This indicates the weaknesses of the Coalition strategies. Within the institutional set-up of the EU, trade unions and green and social NGOs are clearly disadvantaged. By remaining almost exclusively within these structures through an emphasis on lobbying at the supranational level in Brussels, the chances of success were limited from the very beginning. By equating power with the EU state apparatus, the importance of organised opposition outside the institutional set-up within civil society was overlooked (Morton, 2007: 90). Coalition members generally understood the directives as part of the wider Commission agenda

of neo-liberal restructuring in the EU. For EPSU, the two directives were clearly part of the general neo-liberal restructuring and the predominant focus on the market and competition. They were seen as a further attempt to restrict the room of manoeuvre of the public sector and public services for the benefit of big corporations (Interview No. 1). Others regarded the directives as an expression of the drive for competitiveness reflecting the general Lisbon strategy and resulting to a large extent from lobbying by transnational capital (Interview No. 2; Interview No. 4; Interview No. 9). Hence, Europe would not be a social Europe (Interview No. 6). Yet again others considered the directives as part of the EU's focus on creating the European market and they are, thus, part of a coherent, market-oriented philosophy (Interview No. 3; Interview No. 7). Nevertheless, while the directives were clearly understood as part of a neo-liberal strategy, the Coalition did not turn its activities into a challenge of neo-liberal restructuring more generally. While EPSU regarded the struggle against the draft directives as part of a general struggle against restructuring of the public sector, this was not the case for social and environmental NGOs (Interview No. 1). As one interviewee put it, although the competitiveness drive is realised by his organisation, in the day-to-day work they would need to concentrate on concrete issues linked to particular policy proposals (Interview No. 4). The representative of the WWF-European Policy Office made clear that his organisation's participation in the Coalition was solely motivated by adding support for labelling of forest products and, therefore, it was the directives themselves they were concerned with, not a more general positioning on the private versus public sector debate (Interview No. 2). Other environmental NGOs confirmed this position. Their main concern were the implications of public procurement for climate change, not public sector restructuring as such (Interview No. 4; Interview No. 7). In short, while the Coalition was united in its demands for green and social criteria as a part of the public procurement directives, they did not share a more fundamental understanding of this struggle being one component of a larger struggle against restructuring in the EU.

There were clear signs that attempts were made to broaden the social basis of resistance. A wider strategy is best expressed in a summary document for the EPSU executive committee meeting assessing the situation in June 2001 (Document No. 6). In the points for decision, the executive is asked to endorse high profile public events such as demonstrations and to support the joint press work with social and environmental NGOs to increase the pressure and broaden the campaign. Moreover, executive members should get involved in national debates on public procurement. The latter was further developed through repeated calls for establishing coalitions on public procurement at the national level, similar to the Coalition within the EU. In a note of the EPSU Public Procurement Task Force and Coalition meetings in March 2002, it is outlined that EPSU and NGO affiliates will receive their respective membership lists with the specific purpose to develop joint lobbying activities at the national level. The note also makes clear that the cooperation should go beyond a temporary coalition in relation to the public procurement directives and develop around the concept of sustainable development (Document No. 13). Nevertheless, while the attempts were there to broaden the coalition, in practise

this was not successful. The strategy mainly resulted in a campaign of sending letters to MEPs and lobbying national governments (Document No. 7). National trade union representatives were contacted in view of a possible demonstration on 11 June 2001 in Strasbourg in relation to an EP plenary (e.g. Document No. 4), and some positive support for such a demonstration was received (e.g. Document No. 5). In the end, this demonstration specifically in relation to public procurement did not take place. Instead, the concerns of EPSU and other Coalition members were incorporated into a general ETUC demonstration in Liege on 21 September 2001 (Document No. 8), proving much less effective (Interview No. 1).

In sum, all efforts stayed within the ideological structures of neo-liberalism and the institutional structures of the EU. The Coalition did not succeed in mobilising more broadly in support of its policies in order to challenge more successfully the neo-liberal restructuring of the public sector within the EU. Ultimately, only by posing the question of power within society through the formation of new alliances around alternative projects will it be possible to challenge neo-liberal restructuring in the EU. The experience of European dockworkers is illustrative in this respect. In 2001 and 2004, the EU Commission attempted twice to liberalise services in European ports. On both occasions, transport workers' unions were able to prevent restructuring through a combination of lobbying with internal information and mobilisation campaigns, international strikes and large demonstrations. As Turnbull states, 'by adding the argument of force to the force of argument, port unions have been able to play the information-gathering, report-writing, lobby resolution-passing game to much greater effect' (Turnbull, 2007: 133). The Coalition should have acted similarly. For a more successful campaign a broader mobilisation strategy around an alternative project for the public sector, similar also to the Campaign for the Welfare State in Norway, discussed in Chapter 12, would have been necessary to back up the lobbying efforts at EU level. It will be interesting to consider if the broader coalition both in terms of its project as well as its membership, embodied by the Spring Alliance (see postscriptum), will be more effective. The issue of procurement continues to be a battleground of public sector restructuring and of social justice, and sustainable development has gained in significance since the early 2000s.

A post-scriptum: the continued significance of the struggle for sustainable procurement (Andreas Bieler with Jan Willem Goudriaan)

The demand of the trade unions for a European instrument on social clauses in procurement had already been recognised by the Delors Commission in the late 1980s. The European Commission published a social action programme in reaction to the Community Charter of Fundamental Social Rights of Workers adopted in November 1989. It included 47 initiatives to develop the rights in the Charter. One of the initiatives was a proposal for a Community instrument for the introduction of a labour clause in public contracts. Already in its first application report, the Commission dropped this, arguing that it was taken care of in the

proposal for a Posted Workers Directive (Commission, 1991). The Employment and Social Affairs Committee referred to this in its opinion on the Green Paper on Procurement several years later: 'it is therefore important to keep up the pressure on the Commission to incorporate specific social clauses in existing directives on public procurement, as was indeed provided for in the social action programme' (Van Lancker, 1998). DG Internal Market, one of the strongholds of the Commission's neo-liberal policies, however, did not relinquish its control over this dossier and continued to advance a restrictive view on social considerations in its interpretative Communication (Commission, 2001).

The final directives did not resolve the issues despite the efforts of the Coalition as recorded here. Several members of the Coalition issued a joint guide urging members to seek a correct implementation and use of the Directives (Coalition for Green and Social Procurement, 2004). As the UK labour law professor Brian Bercusson argued, the lack of clarity of the EU procurement directives regarding social considerations is 'a recipe for future conflicts' in the courts leaving the European Court of Justice (ECJ) 'to tidy up the mess on a case-by-case-basis' (quoted in Grimshaw, 2004: 114–15). The ECJ did just that in the Rüffert case in 2008 (C-346/06) in a way that transformed the Posted Workers Directive from a focus on minimum provisions to one on maximum provisions: 'in the context of posted workers, if the employment protection measure (be it the legitimacy of industrial action, or a clause requiring compliance with collective agreements in a procurement contract) exceeds the level of protection guaranteed by the Posted Workers Directive, then it is likely to be contrary to EU law'. This is a rather surprising logic. The Posted Workers Directive is designed to ensure that workers posted from one member state to another enjoy minimum standards of protection by reference to the minimum legal standards and applicable collective agreements in the member state to which they are posted. The Posted Workers Directive is not intended to set limits on the circumstances in which pay and conditions can be provided for under the law and collective agreements in member states to which workers are posted. The ECJ's stance that such minimum standards would undercut the competitive advantage of employers such as the Polish contractor in the Rüffert case is not in line with this directive. Employers are already protected by the EU's non-discrimination principles. They should not be protected if they seek to obtain competitive advantage by undercutting the industry norms, standards and collective agreements in the member states in which they seek to operate (see the commentary by the UK law firm Thompsons; <http://www.thompsons.law.co.uk/ltext/the-ruffert-judgment.htm>, accessed 7 January 2010).

This judgement provoked an outcry in the labour movement (e.g. ETUC, 2008). The unions have argued that the Rüffert case continues a line in recent judgements that gives precedence to the freedom to provide services over fundamental rights, exactly what has been the line of DG Internal Market in procurement cases. It would be wrong to believe that the ECJ has settled the issues. Advocate General Kokott (2008), for example, reports that there are differences of opinion in the Court. Moreover, the continued pressure of the unions forced the European Commission to reflect on measures to improve the Posted Workers Directive (Silva, 2008).

This will not, however, be enough to ensure that social and environmental considerations can be taken fully into account by public authorities in procurement. The labour clause in public contracts needs to be clearly distinguished from the Posted Workers Directive as was also underlined by the ILO (2008a: 85–86). Its committee of experts did not buy into the philosophy of DG Internal Market that ILO conventions are subordinated to the internal market rules and states in point 248 of its report on the application of ILO convention 94:

The Committee considers that there is nothing in the provisions of the two directives which would prevent EU Member States from requiring contractors through national laws to ensure to workers engaged in the execution of contracts wages (including allowances), hours of work and other conditions of labour which are not less favourable than those established for work of the same character in the trade or industry concerned in the district where the work is carried out by the methods set out in the Convention.

Both the ILO practical guide (ILO, 2008b) and the comprehensive report World of Work Report 2009 (ILO, 2009: 63–95) underline that the issues are far from decided. International financial institutions have come under pressure to include labour clauses in their public contracts and the ILO itself will promote ILO convention 94 with more vigour. Moreover, the European Commission's guide on Socially Responsible Public Procurement, a draft of which was published on 3 April 2009, has become a new focus of lobbying. EPSU and other union federations were critical of this draft arguing that it was minimalistic and sought to reduce the scope for social considerations below what was possible. It also does not take account of ILO convention 94 (EPSU, 2008 and 2009). Most recently the EP adopted a resolution on new developments in public procurement, 18 May 2010. It calls on the European Commission to take a more positive approach to the integration of social and fair trade criteria in public procurement. The parliamentarians also draw attention to ILO Convention 94 which 'stipulates that general public contracts shall contain clauses ensuring equitable remuneration, and labour conditions which are not less favourable than those laid down in collective agreements, for example' (European Parliament, 2010). And interestingly there is also a resurrection of the coalition. Most of its members are part of the so-called *Spring Alliance*, a coalition of trade unions, social groups and environmental organisations. It has included the social and environmental considerations of procurement in its Manifesto to seek changes in EU policy (Spring Alliance, 2009). Possibly the Alliance might have more success than the Coalition. Its demands are part of a larger platform for change. Nevertheless, here too the force of argument has to be combined with the argument of force in order to have any chance of success.

Interviews

Interview No. 1: Deputy General Secretary, European Federation of Public Service Unions; Brussels, 4 September 2006.

- Interview No. 2:* Director of WWF-European Policy Office; Brussels, 5 September 2006.
- Interview No. 3:* Director, European Disability Forum (EDF); Brussels, 6 September 2006.
- Interview No. 4:* Director, Climate Action Network Europe (CAN-Europe); Brussels, 7 September 2006.
- Interview No. 5:* Secretary General, Solidar (until 2006); Secretary General, European Parliamentary Labour Party – Socialist Group (since 2006); London, 15/09/2006.
- Interview No. 6:* Research Officer, Clean Clothes Campaign; telephone interview on 14 September 2006.
- Interview No. 7:* Research Officer, Climate Alliance; telephone interview, 25 September 2006.
- Interview No. 8:* Secretary General, European Centre of Enterprises with Public Participation and of Enterprises of General Economic Interest (CEEP); Brussels, 5 March 2007.
- Interview No. 9:* General Secretary, European Environmental Bureau (EEB); Brussels, 8 March 2007.

Documents

- Document No. 1:* Email by EPSU representative to other trade union colleagues raising for the first time the possibility of a jointly signed letter with other organisations such as Oxfam, Solidar, EEB to Stefano Zappala, MEP, the rapporteur of the EP Legal Affairs Committee (8/12/2000).
- Document No. 2:* Email by EEB representative to EPSU representative asking to whom the letter lobbying the EP Legal Affairs Committee for postponing the first EP vote on public procurement should be sent (18/01/2001).
- Document No. 3:* Email by EPSU representative to Swedish union colleagues outlining the core issues at stake for trade unions (25/04/2001).
- Document No. 4:* Email by EPSU representative to ÖTV representative, indicating cooperation with environmental NGOs and raising the issue of a demonstration in Strasbourg on 11 June 2001 (04/2001).
- Document No. 5:* Email to EPSU representative, confirming support by SPS-FO/France for June 2001 demonstration in Strasbourg (27/04/2001).
- Document No. 6:* Summary document of state of play for EPSU Executive Committee meeting on 12 June 2001 (06/2001).
- Document No. 7:* EPSU Executive Committee Circular No. 13 (2001) to all EPSU Executive Committee members, asking them to write to country MEPs on the EP Legal Affairs Committee as well as follow up public procurement issues with their governments (29/06/2001).
- Document No. 8:* EPSU Executive Committee, 28–29 November 2001, Agenda Item 4.2 Public Procurement (11/2001).
- Document No. 9:* Email by Climate Action Network Europe to EEB representative, signalling his support for a joint campaign of lobbying MEPs prior to the first reading of the directives in the EP on 17 January 2002 (09/01/2002).
- Document No. 10:* Email by Fern – Fair Trade Coalition representative, welcoming Solidar as part of the coalition and supporter of letter to MEPs (10/01/2002).
- Document No. 11:* Email by DGB representative to German trade union representatives assessing the EP vote in its first reading (18/01/2002).
- Document No. 12:* Email by EPSU representative to EPSU Public Procurement task force inviting them for a meeting in the morning of 19 March 2002 to discuss strategy prior to

the Internal Market Council meeting on 21 May to be followed by a meeting with coalition members in the afternoon of 19 March 2002 (28/02/2002).

Document No. 13: Note of EPSU Public Procurement task force and Coalition meetings of 19 March 2002 (19/03/2002).

Document No. 14: Letter sent to all permanent representations in Brussels in relation to the 'generally binding' collective agreement notion in Art.27 (02/04/2002).

Document No. 15: Email by trade union colleague to EPSU representative, complaining about emphasis on cooperation with social movements at the expense of core trade union business (24/04/2002).

Document No. 16: Email by EPSU representative to trade union colleague in response to his earlier complaint (24/04/2002).

Document No. 17: Report on lobbying meeting of coalition members with representative of the Belgian Minister for Economic Affairs in view of Internal Market Council meeting on 21 May 2002 (attached to an Email to coalition members of 08/05/2002).

Document No. 18: Email exchange to organise meeting of EPSU Public Procurement Task Force as well as meeting with Coalition on 11 September 2002 prior to the next Internal Market Council meetings on 26 September and 14–15 November 2002 as well as the second reading in EP (16/07/2002).

Document No. 19: FAX by critical trade union colleague (see Document No. 15) outlining reasons for different interests of unions and environmental NGOs, being again sceptical of the coalition approach (24/07/2002).

Document No. 20: Letter by EPSU representative on behalf of the coalition to Maria Berger, MEP, supporting a change of Art. 53 along the lines of the one adopted in the EP's first reading (20/05/2003).

Document No. 21: Letter by EPSU Deputy General Secretary to MEPs of the EP Legal Affairs and Internal Market Committees to outline EPSU position, referring also to EPSU's membership in the Coalition (12/06/2003).

Document No. 22: Email by EPSU representative to EPSU Public Procurement Task Force asking colleagues to send letters to their respective national MEPs (12/06/2003).

Document No. 23: Email by EPSU representative to EPSU Public Procurement task force, informing them about a forthcoming meeting with MEPs and the issues to be raised in view of the second reading of the EP (24/06/2003).

Document No. 24: Email by EPSU representative to the Swedish trade union representative (LO/TCO/SACO) in Brussels, confirming the support of the municipalities (CEMR) and Eurocities as well as lobbying activities of NGOs in Strasbourg prior to the decisive vote of the EP in its second reading (26/06/2003).

Document No. 25: Brief ETUC summary of EP voting: both goals in relation to Art.27 and Art.53 were achieved (09/07/2003).

Document No. 26: Email from representative of Eurocities indicating willingness to appear on coalition statements and being more 'permanently' attached to coalition (11/09/2003).

Document No. 27: Email by MEP outlining the details of the compromise of the 2 December conciliation committee meeting (03/12/2003).

Notes

- 1 For a more detailed and theoretically conceptualised analysis of this case study, see Bieler (2011).

- 2 The analysis is based on public documents by the Coalition as well as its individual members, nine semi-structured elite interviews with representatives of Coalition member organisations, as well as the archive by the main representative of EPSU in relation to the Coalition efforts. The latter includes copies of emails related to the campaign, official position papers, as well as minutes of Coalition meetings. It is indicated in a Harvard style system, where information was drawn from which source.
- 3 In its first reading in January 2002, the EP put forward an amendment to Art.27 of the classical directive, which stated that generally binding collective agreements must be adhered to. While this looked very positive at first sight, this is a 'false friend', since in many EU member states the majority of collective agreements are not generally binding, but cover various areas or companies. Hence, the need for trade unions to lobby the EP and Council not to accept this amendment.

Part VI

What strategies towards transnational solidarity?

14 Making connections

Transnational solidarity through the Internet

Bruce Robinson

Introduction

The very concept of transnational solidarity implies the overcoming of the fragmentation caused by physical separation and the formation of a collective actor pursuing a common goal across space. 'The practice of labor solidarity is . . . a process of opening up the landscape and making the connections between workers in different parts of the globe visible' (Herod, 2003: 509). The widespread (though far from universal) provision of a fast, cheap and technologically homogeneous global communications network therefore opens new possibilities for transnational labour solidarity. As a 'technology . . . that is able to "shrink" or "create" space' (Brey, 1998), the Internet allows workers both to take action across distance easily and create new locations where solidarity action can take place. It has the potential not merely to make traditional forms of international solidarity more effective (e.g. by enabling easier contact, better coordination or the faster dissemination of information) but also to develop original forms of solidarity action based on exploiting opportunities created by information and communications technologies (ICTs) themselves.

With the continued development of Internet technology and the growth in the availability of high speed computer networking, it is now possible for trade unionists to create their own social networks and virtual spaces enabling direct real time interaction. This is an opportunity to create the new and intensified human contacts which may form the basis for a solidarity relationship to others (see Introduction to this volume). To the extent that employers also locate their activities in cyberspace, the Internet can become an arena for industrial conflict and thus for practical solidarity. The contribution of the Internet to the remaking of labour solidarity is thus potentially great. This chapter will consider contrasting cases of what we shall call cybersolidarity – Internet-mediated action in support of trade unions or groups of workers involved in disputes with employers or the state. In the two cases we consider, the use of the Internet goes beyond the organisation of offline actions to exploit the distinct potential of Internet technology and make the Internet itself the mechanism by which solidarity action is taken.

The first case is an urgent email campaign held in May 2005 in support of Eritrean trade unionists imprisoned by their government. It consisted of supporters

putting their names to emails demanding their release on the labour website Labour Start, which were then forwarded to Eritrean embassies around the world. This particular campaign is not the most recent of its type nor the most widely supported. For example, a successful campaign in April 2009 to help free an imprisoned union leader in Iran attracted nearly 7,000 participants (Lee, 2009). However the Eritrean campaign has a number of features that make it a particularly rich example. The second case is the 'virtual strike' and mass picket held in the virtual world Second Life on 27 September 2007 in support of workers at IBM Italy, which was organised by the international union federation for skills and services UNI and the Italian union representing IBM workers, the Rappresentanza Sindacale Unitaria (RSU) union.

These cases differ along a number of dimensions that allow us to examine in more detail the implications of Internet use for transnational solidarity. Following a brief discussion of the background issues, each event will be described in terms of its context, use of the Internet and result. The examples will then be compared. Subsequent developments in union use of the Internet that create further possibilities for transnational solidarity will also be discussed briefly. We then examine the preconditions for the use of Internet for transnational solidarity and make an assessment of its effectiveness and its relationship to other forms of solidarity action.

Background

The Internet emerged in a period of globalisation accompanied – in Western countries at least – by serious union decline. Discussion of the role of the Internet in transnational solidarity has become entwined with a more general debate on the current state of trade unionism and the need for the construction of a 'New Labour Internationalism' to respond to globalising capital in a period where national trade union structures are no longer adequate (see Introduction to this volume). The role of the Internet in this reconstitution of labour internationalism is now widely recognised, but its precise contribution and potentialities are still the subject of debate. While Eric Lee (2007), the founder of the Internet portal Labour Start, optimistically argues that cybersolidarity itself 'can tip over into a massive resurgence of trade union internationalism at a global level', others believe that use of the Internet can at best be a useful supplement to more traditional forms of international union solidarity (e.g. Renton, 2004).

The structures and ideology of unions affect how their members take up new forms of communication (Martinez Lucio and Walker, 2005). Thus while pro-labour activism shares many features with broader cyberactivism – the development of activist networks and the use of ICTs in support of a social movement – it has a number of specific features that are important. Lee (2004c: 81) has noted that 'probably the final obstacle to a new global unionism will be the conservatism of the unions themselves' and this has been reflected in attitudes to the adoption of ICTs. While they are mass membership organisations, those in control of unions have often been reluctant to share information and potentially open themselves up to criticism from the ranks or to provide a platform that could be used for unofficial

organisation within the unions (Newman, 2005). Yet at the same time, rank and file union members have taken a number of their own initiatives in using the Internet for self-organisation, solidarity and debate as in the online forums set up during the 2003 UK fire fighters' strike and the 2009 UK construction workers' strikes (www.bearfacts.co.uk, accessed 3 November 2009). This use of the Internet 'from below' is likely to grow as newer forms of technology that permit the development of social networks and spaces become more widely known. These tensions have led Martinez Lucio *et al.* (2009) to describe "labour networking" . . . as a complex ecology of competing and cooperating forms and purposes'.

In the 1990s, the drive towards using the Internet as a vehicle for international trade union solidarity came mainly not from within the formal structures of trade unions themselves but rather from a number of people with technical skills and a political commitment to the trade union movement who were also enthusiastic about using ICTs for its goals. Now few unions lack some sort of presence on the Internet and such people are often employed directly by unions. While some unions and international federations have been innovative, union use of the Internet still all too often reflects a model of top down information dissemination that Waterman (2001) characterises as a use of 'ICT as *instrument* (faster, cheaper and further-reaching), not as *cyberspace* (another kind of space with unlimited possibilities for international dialogue . . .)'. Newman (2005) thus asks 'Is Labor Missing the Internet Third Wave?'

Our case studies will compare the results of using different Internet technologies, the capabilities of which correspond broadly to Waterman's distinction. Both overcome the constraints of distance to construct a transnational actor capable of practical solidarity action. In this respect, 'net-internationalism' (Hodkinson, 2001) is already a fact.

Case one: an email campaign in support of imprisoned trade unionists.

Three Eritrean trade union leaders were arrested and illegally held on 30 March and 9 April 2005. This first became widely known six weeks later via the international trade union federations to which their unions were affiliated. The International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations (IUF) made a call to protest to the Eritrean government. The campaign was picked up by the trade union news service Labour Start from the website of the IUF and a link provided leading to the text of a letter to the Eritrean government calling for their release that could be sent off electronically. These letters were forwarded to Eritrean embassies round the world. Details of the campaign were sent to the 31,000 subscribers to Labour Start's e-list. The campaign was taken up by other organisations and over 5,000 emails were sent within a week (1,500 in the first 14 hours) through Labour Start and other websites taking a news feed from it. A number of organisations, ranging from the British activist campaign 'No Sweat' to the umbrella international union federation, the ICFTU, took up the case in different ways ranging from street protests to a complaint to the ILO. While

it did not lead to the freeing of the trade unionists, Labour Start received feedback indicating that the action had an impact at Eritrean embassies.

Insofar as this action took place through the Net, it was largely defined by the forms of social organisation and information flows enabled by the technology and structures of Labour Start, which played the central role in making this a mass campaign (for a more detailed account see Robinson, 2008b). Labour Start's facilities emphasise the speedy flow of information and ease of use and require a very low level of commitment to take part in campaigns. The campaign has to motivate atomised individuals to participate and aims to make an impact on remote third parties. Awareness and involvement are maintained through a top-down flow of information to the Labour Start email list that informs readers of current campaigns as well as via the provision of news on the website. Most participants generally remain remote from direct links with those whom the action is intended to support and from one another.

Despite this, such campaigns can be valuable. Though responses to particular Labour Start email campaigns differ greatly, they enable the rapid mobilisation of thousands across national boundaries at a minimal cost of time and resources to either participants, organisers or those the action is intended to support. It is the speed, timeliness and ease of net-based email actions that distinguish them from earlier forms of solidarity. At one level, sending an email is little different from signing a paper petition, but it would hardly be possible to get together a petition with 5,000 signatures from around the world and deliver it to Eritrean embassies within a few days of learning about the imprisonment of trade unionists in a distant country.

Case two: picket lines in a virtual world

On 27 September 2007 a 'virtual strike' and demonstration took place in the virtual world Second Life (SL) in support of Italian workers at IBM. The dispute with its Italian workforce arose when IBM Italy rejected a claim for a small pay rise, cancelled a performance bonus worth €1000 and refused to talk to representatives of the 9,000 strong Italian workforce, organised in RSU. The initiative for the SL action came from RSU, who approached the international union federation Union Network International (UNI), at the time the only union organisation with a presence in SL (Revkin, 2008). For the RSU, the SL strike was a response on which the authority of the union depended (Barillari, 2008).

Second Life is a virtual world that can be accessed through standard PCs with a broadband connection. It appears on the computer screen as a physical landscape with buildings, cities, islands and green space. Within this space, avatars – software representations most commonly of humans, controlled by real world actors – can exist and act, subject to a set of evolving rules decided on by the owners of the real world company Linden Labs. IBM has been a major investor in SL, spending \$10 million on buying land and developing virtual built environments. Some IBM areas in the SL world are public and function as sales and marketing tools; others are restricted to IBM employees for internal purposes such as international meetings.

Over 6,000 IBM employees spend some or all of their work time in SL (Barillari, 2008). The RSU organised the SL day of action together with UNI. Publicity went out in advance through unions and labour portals such as Labour Start. The action also received considerable media attention and over 900 people had registered to take part in the action beforehand. It took place over 12 hours to enable supporters across a range of time zones to take part. The SL protest was also coordinated with real life pickets outside IBM offices in Italy. (All online materials relating to the action can be found at: <http://ibmslprotest.blogspot.com>; 03/11/2009). RSU and UNI had taken considerable steps to prepare the action including setting up a UNI SL area where protesters were advised to report initially. Materials to identify participants such as placards were available. Avatars providing assistance were on hand there and at a number of IBM installations. They carried banners to inform passers-by and suggest they might take part by signing an online petition and also gave advice to protesters. As the protesters became more numerous, IBM reacted by closing down its Business Center to the public. Anyone trying to enter without a password bounced off an invisible barrier. Thus the protest brought about the closure of a public space 'open for business' and its transformation into a private territory only open to those who could be trusted by IBM. However this technical solution failed to work as an anonymous contributor to the UNI blog reported:

Remember the IBM Business Center I was telling you about? The one that closed down some parts so protesters couldn't enter anymore? Well I don't know what miracle happened, but my avatar got into a real staff meeting! They were discussing the corporate website's new functionalities, it seems. So since I managed to get in, why not call some of my protester friends? Minutes later, some 20 participants and staff teleported to literally crash the meeting . . . The poor IBM staff were quite confused and asked us to go protest outside. We, in return, demanded to speak to IBM management to put forward our requests. They ended up cancelling their meeting.

How different is this from the way a picket line might operate in real life? Another participant wrote on the UNI blog:

I don't know about you, but this is my first virtual protest! Surprising to **notice how close to RL (Real Life) it really is . . . yet, nothing's normal:** no one I meet 'has' a real name, I have no idea if they are all IBM workers, trade unionists or spies, if they are from Canada or India! But they all showed up, speaking many languages, demonstrating with the banners . . . *Nothing's normal*, except that IBM management hasn't met with us in SL and still hasn't offered a response to our repeated requests for a return to the bargaining table and decent wages and benefits for its Italian workers . . . [emphasis in the original].

The event was a success in mobilising IBM workers and sympathisers. 1,849 avatars were counted as having taken part in the SL action (Barillari, 2008) and,

though this does not translate directly into numbers of real people, figures of 1,000 on the email list of participants and 700 sending online petitions to IBM Italy seem broadly to correspond to the number registering for the action. Its international nature was also impressive with participants from 30 countries.

Despite this, there was uncertainty as to whether IBM would back down. However on 24 October, the CEO of IBM Italy resigned. Negotiations with the Works Council resumed and the performance bonuses were reinstated. The aims of the SL action were thus won. Christine Revkin (2008), organiser of the SL protest for UNI, commented: 'The threat of strike action in the "real world" by the Italian unions after the virtual protest has certainly also helped to break the deadlock. Yet the impact of this historical action in Second Life must not be underestimated'. It was perhaps also the novelty of the protest and its consequent press coverage that was particularly important in creating pressure on IBM. Participation in this action clearly required more preparation and a greater commitment of time and effort than the Eritrean campaign. Partly this was because many participants had no previous experience of SL; but also because keeping an avatar active in SL requires regular interaction with the software. However, in compensation, direct interaction between participants was possible and enabled learning, shared experience, self-organisation and informal sociability, which helped overcome the fact that most were isolated individuals sitting at their PCs by giving a feeling of real, direct solidarity (Robinson, 2009). The materiality of the virtual world enabled a direct impact closer to that of a 'real life' picket.

Comparing the two cases

These two cases differ along a whole number of dimensions ranging from the nature of the targets and the participants, through the form of social organisation, to the technology model used (see Table 14.1 below). None of these factors on their own should be taken as the reason why one action failed and the other was successful. Some email campaigns have been successful, while the SL action may not be so easy to repeat as IBM has taken steps to increase the security of its in-house activities in SL (Robinson, 2009). Nor are the two methods mutually exclusive. Labour Start encouraged participation in the IBM action, while RSU used an online petition to back up its SL pickets. The two actions have a number of aspects in common: first, both were *transnational*: the Eritrean action led to supporters across the world taking action to support trade unionists suffering under a repressive regime, while the IBM action drew in both IBM workers and other participants from countries as different and far apart as Canada and India with the pickets conversing in a number of languages. Second, both *transformed pre-existing constituencies of potential participants into actors online*. Labour Start has built both an email list now (2009) numbering around 60,000 of those who have taken part in campaigns or expressed a wish to be kept informed of labour news as well as a considerable general reputation as a source of labour news and campaigns. However this level of support does not necessarily translate into active participation in campaigns. Participants must be mobilised. In the IBM case,

Table 14.1 Comparison of the two case studies ERITREA and IBM

	<i>ERITREA</i>	<i>IBM</i>
ORGANISER	IUF/Labour Start	UNI/RSU
GOAL	Free prisoners	Restoration of collective bargaining and bonuses
TARGET	Government	Employer
METHOD	Sending email	Strike/protest in virtual (also real) world
TYPE OF ACTION	Letter writing	Street protest/Online petition
RESPONSE	> 5k in a week/Other protests	Over 1,800 avatars on day; probably ca 1k people
WHO?	Labour activists/trade unionists	Labour activists/trade unionists/IBM workers
TECHNOLOGY MODEL	Web 1.0 – information flows	Web 2.0 – social networking
TEMPORAL ASPECTS	Asynchronous (Any time)	Synchronous (Coordinated time)
SPATIAL ASPECTS	Point to point	Assembly at points in cyberspace
PUBLICITY	Websites/email	Websites/email/media
REQUIRED RESPONSE	Point and click/form filling	Electronic presence and action/Learn SL skills
INTERACTION	One to many/Individual participation	Many to many/Collective participation
FEEDBACK	Email invitation to e-list	Registration email/Post to blog
INFRASTRUCTURE	Website/e-list/Feed to other sites	SL site, clothing and placards/Blog/Website
RESULT	Failure	Success

the union was also able to call on Labour Start's resources, alongside those of an international union federation UNI and other labour networks. But within IBM the union had an additional structural relationship to the IBM workforce in Italy and across the world, many of whom used SL in their work.

Third, both required a *pre-existing infrastructure* on the Net. Labour Start has provided a website of daily world labour news with email campaigns since the late 90s and has sought to use varied technologies to provide this information quickly. The IBM strike required the construction of the reception point in SL, the creation

of banners and T-shirts, the setting up of an email list for disseminating information on what to do and when the action would occur, together with a blog to provide an open point of contact on the Net and allow the posting of experiences and feedback from participants. There are distinct models of both the types of technology used and the forms of social organisation and interaction they enable underlying the two actions. Waterman's (2001) distinction between 'ICT as instrument' and ICT as 'cyberspace' broadly corresponds to the distinction between what have become known as 'Web 1.0' – communication simply via information flows – and 'Web 2.0' technologies such as wikis, chat rooms, blogs, social networking platforms and virtual worlds such as SL. While there are several different definitions of Web 2.0, these technologies generally permit a more pro-active role for the user and many also enable the creation of a virtual space within which direct real time interaction is possible. They can potentially improve members' participation, involvement, and mobilisation in unions and a 'Unions 2.0' group has been set up to encourage their creative use (Barillari, 2008).

Developments in union use of Web 2.0

Subsequent to the IBM action there have been two further developments in union uses of Web 2.0 technologies which can be used for supporting international solidarity initiatives.

Some of the organisers of the IBM action have set up a permanent location for trade unionists in Second Life called Union Island consisting of a virtual landscape and buildings inaugurated on May 1st 2008. It contains exhibitions on labour history and current union campaigns; an area to learn how to use SL; another on why you should join a union; a museum dedicated to the IBM strike; and, last but not least, a bar complete with dartboard and pool table, where informal discussions can take place. There are also private rooms for formal meetings.

Sponsored by UNI, the British Trades Union Congress (TUC) and the German service sector union Ver.di, it is intended to support a number of goals:

- having a place where trade unionists from around the world could meet both formally and informally without travel costs;
- having a place where people could be introduced to trade unionism;
- having a base on the net for campaigning and actions like the IBM one;
- making new partnerships with groups active in SL (NGOs, political groups) and 'digitally creative' people;
- learning more about virtual worlds and what people are doing in them;
- promoting the use of 'Web 2.0' tools by unions (Revkin, 2008; Wood, 2008).

Union Island displays material on solidarity campaigns with trade unionists in Iran and Zimbabwe and provides resources to use in support both within SL (e.g. free t-shirts for avatars) and more generally. It has also been the focus for meetings and SL campaigning, for example, on World Day for Decent Work.

Apart from this the major value of Union Island must lie in its role as a direct channel of communication that enables more directly social and many-to-many interaction than other media such as e-lists and which can therefore be the foundation for new networks and collectivities. Participants include Mongolian trade unionists who face travel difficulties and thus had few direct contacts outside their countries. Wood (2008) also gives the example of 'getting a few organisers together in a virtual bar and finding two of them are facing the same union busting firm on different sides of the Atlantic, and can make vital link-ups in tactics for responding to it'. This shows the potential for building direct links for transnational solidarity at virtually zero cost but with more flexibility than with email. Union Island has so far been an experiment. Its eventual success as a tool for trade unionists depends on the fate of SL as a technology more generally, on overcoming the obstacles to easy participation and on providing more activities that will attract users for, as Revkin (2008) comments, 'Second Life islands that don't run regular public activities aren't really visited'.

The second Web 2.0 development is Union Book (www.unionbook.org), a site that uses free open source software to create a union-oriented social networking facility. The motivation was to provide an alternative to commercial sites such as Facebook both to meet concerns about privacy and the commercial use of personal data and to provide something specifically oriented towards trade unionists. By May 2009, less than six months after its launch, Union Book had just under 3,000 members. Benefits for campaigning on international solidarity includes scope for online groups to coalesce around particular issues and for posting to the site or blogging so that members can find out about and participate in particular campaigns. It also provides an assessment of the suitability of different Web 2.0 applications for a range of union activities. The development of Union Book is still under way and it is too early to assess its likely effectiveness. However earlier experience of discussion forums on Labour Start suggests that one concern will be with maintaining momentum and participation.

Assessing transnational cybersolidarity

Participation and effectiveness

The contribution of an Internet solidarity action to the outcome of an industrial dispute is very difficult to assess. There are two measures of success (Lee, 2005). The first depends on the impact on the dispute. Assessing this depends on feedback from the direct participants, whether those the action supports or those it is aimed to influence. This might not give a true picture of the real impact of the action and it is difficult otherwise to ascribe a precise assessment of its role in the overall outcome of a dispute (e.g. the winning of a strike). The second measure of success is how far the action has served to mobilise individuals to take part in it. This is a quantitative measure in terms of the number of people joining an action. However easy it is to take part, involvement in online campaigns is ultimately an individual decision. The collective strength and pressure found in the workplace is not repeated in

front of the computer screen. Thus the extent of responses to particular campaigns may vary considerably, not always in proportion to the inherent importance of the issue (Lee, 2004b). There is no necessary correlation between measuring success by outcome or by mobilisation. Assessing the contribution of online action to the success of a dispute is therefore difficult, even if in exceptional cases such as IBM it can clearly be seen as central. Participants in disputes backed by online action may often acknowledge in general terms the value of international support without specifying how important it was in the outcome. What is clear however is that online campaigns can serve to express widespread international solidarity speedily and can in certain situations affect the outcome of a dispute. Effective online solidarity action requires that certain preconditions be met – as necessary rather than sufficient conditions for success. These will now be discussed in the context of our two case studies.

Mobilisation, motivation and collectivity

Evidently any action needs to mobilise participants to take part. In part, this is a question of information, knowing what is going on and why; in part, a question of motivation, which is linked to issues of identity and social location. In this respect, neither labour-oriented nor online activities are peculiar. Rather, a collective identity is generally necessary to underpin social movement mobilisation (Miller, 2004). In the case of trade unions, there is a pre-existing ethos of solidarity and internationalism and organisational identities as trade unionists that can be appealed to. This does not lose its importance as a means of collective identity because of the individualistic nature of Internet use. Rather users bring their social identities, including such norms, into the virtual collective (Brunsting and Postmes, 2002; Kendall, 1999). Given the nature of email actions, here the potential collective only becomes a real collective actor through its impact on third parties (whether those they are aimed to pressure or those they aim to support). Participants remain unaware of one another. The action occurs in a form prescribed by the organisers and there is no real scope for interaction and the active formation of solidarity among those taking part. The IBM SL action broadly appealed to the same constituency of trade unionists and labour activists as the Eritrean campaign but it allowed a much more open-ended form of participation. It appealed to the novelty of using SL as a means of union action, promising something closer to a real life experience of a strike. Here participants were able to create a collective actor directly through their presence at IBM's locations in SL and to communicate directly with one another creating a feeling of cooperation in pursuit of a shared goal.

In both cases the collective as an active network came to an end with the end of the action, returning to the state of a potential collective actor requiring to be mobilised again. Revkin (2008) noted: 'People seem eager to participate in SL events, almost as if they were anxious for there to be a new IBM-like dispute they can join! That kind of enthusiasm is valuable. . . . so in a way, I'm looking forward to the next big union problem we'll come across!' Apart from personal motivation, participants do not have any necessary incentive to move from one campaign to

the next. The incorporation of the individual into the network remains limited and, in deciding whether to participate in a given campaign, she/he may be swayed by other considerations such as time, 'compassion fatigue', or the geographical closeness and familiarity of the dispute (Lee, 2004b). This contrasts with collective action based on more long-term structural relationships such as working for a common employer or doing the same job.

Infrastructure

Cybersolidarity requires both technical and social infrastructure – it requires both a technological channel and human intermediaries in order to disseminate information, enrol participants and allow the action to be carried through. The technological infrastructure is highly visible, while the social infrastructure is less so. The technologies chosen can have a major effect on the level of participation. To ensure it is as wide as possible, it is best to rely on the use only of those tools and environments that are easily available, cheap or free and open.

The social infrastructure includes the creation of a group of volunteers who work behind the scenes of the action. One task is the provision of timely information so that potential participants can be made aware of issues quickly. Another may be the carrying through of the action itself. In the IBM strike volunteers created a location in SL, acted as helpers for those joining in and provided information on what to do. The social organisation may also involve developing relationships with organisations or groups so that they might distribute information to their members on particular campaigns and encourage them to take part. Other tasks include maintenance of the technology that makes the action possible. The infrastructure is required in order to be able to organise the actions, which require access to potential participants and smooth information flows to them, particularly when, as in the Eritrean case, an urgent response is needed. This brings a long-term dimension to cybersolidarity, which goes beyond the organisation of individual actions. Thus the aim of Union Island is to become a long-term base for online campaigning, while the gradual growth of Labour Start's email list (now with about 60,000 addresses) aims to provide a constituency that can be mobilised repeatedly for solidarity actions.

Online and offline action

How should we assess the relationship between Internet-based solidarity and grounded real world action at one or more physical locations? At first sight, it is easy to see Internet action as simply lacking the power of place-based action because it does not have a direct effect on the target that place-based solidarity actions such as a sympathy strike, a human picket line or a refusal to handle an organisation's goods can have – at least, unless it results, accidentally or deliberately, in damage to the target's information resources or infrastructure or a 'denial of service'. Further, local legal and social conditions still play an important role in industrial disputes. However downplaying the possible effects of online action

ignores both the advantages of speed and range that use of the Internet brings and the way in which online and offline activities may complement each other. Aoyama and Sheppard (2003: 1152) describe the 'dialectics of geographic and virtual space . . . of liberating flows and grounded forces, and of the contrasting logics of distance and proximity'. A number of commentators share this view of the complementarity of online and place-based action. Lee (2004a) notes 'The most successful online campaigns feature strong offline elements as well, including picket lines and other protests. They are not exclusively online', while Davies (2004) notes that it is 'extremely rare for online campaigning and "virtual" associations to be entirely divorced from traditional, offline, place-based and face-to-face campaigns'.

However the online component can allow more local methods to be more effective by fusing with them in new ways. Thus creative use of the Internet may enable trade unionists to evade local restrictions (Grieco and Bhopal, 2005) – as in the Eritrean example where repression meant that external protest was necessary to bring the case to widespread attention. Similarly, the physical remoteness of respondents and subjects in a cybersolidarity action need not be an obstacle to subsequent face-to-face interaction, as when online contact leads to the exchange of delegations (Carty, 2001). Virtual action in cyberspace can also serve to provide the spark that leads to place-based action (as with street protests over Eritrea).

Despite these advantages, there are a number of reasons not to expect a continuous growth in the potential of Internet action. Workers' ability to use or control virtual space is not given once and for all. IBM's counter-measures – moving their internal Second Life activities behind a more secure firewall – point to a shifting balance of advantage (Herod, 1998b) where the close connection between space and technology is central to control. This suggests a sort of guerrilla 'net-war' in which each side may try to gain advantage by technological means. There is also the possibility of direct sanctions against employees, as with IBM who, a while before the strike, introduced a code of conduct governing how they could behave in and use IBM's Second Life installation enforceable through internal disciplinary measures (McDougall, 2007). Finally, actions like the IBM strike also depend on at least the benevolent non-interference of those responsible for the provision of the underlying technical services and the governance of the virtual space (e.g. Internet Service Providers, or Linden Labs in the case of Second Life). Avoiding such interference was one motive for the setting up of Union Book. A virtual presence can never entirely replace place-based action, though it may supplement it or provide a substitute where no place-based action is possible. However, the IBM 'virtual strike' throws the distinction between place-based and online action into question in that it was an action that was both place-based and virtual. The pickets were happening at a location (in cyberspace) that had the characteristics of a place and where IBM was carrying out its real world business activity. This enabled the assembly of virtual pickets who were able to have an effect similar to a real life picket.

Such opportunities are rare, however, at least for now, and the results of Internet campaigns are mixed. Lee (2007) acknowledges that, as well as victories to which Labour Start has contributed, 'most such campaigns fizzle out and disappear with

no such results'. Traditional place-based solidarity will not be replaced by the Internet but rather online action will become another weapon in the trade union armoury – one which will become increasingly important as business activities move into cyberspace and the technology becomes more widely available to and used by trade unionists.

Conclusions

The two case studies show that the Internet is already used for large scale solidarity actions that cross national boundaries and transcend distance. In this sense, a 'net-internationalism' already exists and can 'make new connections visible'. Though its precise contribution to the outcome of campaigns is difficult to measure, Internet action can play a significant role, both in winning disputes as at IBM and in allowing the making of new links between groups of workers and activists around the world. Alongside the advantages, there are some more difficult aspects of Internet use for solidarity. One regards the availability of the technology in many parts of the world – the so-called digital divide – which means that some trade unionists may find themselves excluded from taking part. Another is the fact that participants take part as individuals and therefore do not feel collectively involved as they might in a workplace. Accordingly, reaping the potential benefits of cybersolidarity requires the active creation and maintenance of a socio-technical infrastructure and human networks and new cyberspaces that bring them together, not usually by the replacement of grounded place-based action but by its augmentation. This occurs by drawing respondents, whose physical location does not matter, into online relationships where they can be encouraged to support particular campaigns.

Cybersolidarity has the potential to open up new horizons of labour solidarity by marrying liberating flows of information and new forms of social connection through the Internet with the grounded forces and methods of action more traditionally used in trade unionism. Particular 'E-forms' (Greene *et al.*, 2001) of activity emerge. Cybersolidarity can be expected to develop as technologies change and a wider range of business and union activities are carried on in cyberspace offering new possibilities for transnational solidarity.

15 Varieties of solidarity

An analysis of cases of worker action across borders

Ingemar Lindberg

Unions are always in a sense reactive. They are organised on a class basis, founded on the existence in all capitalist economies of an underlying basic conflict of interests between capital and labour. As the organisation of production changes, unions must renew their way of organising, reacting to new strategies on part of the interests of capital. For a long period of time, economic structures have been nationally based and unions have been organised mainly within a national context. Now, as production and distribution is increasingly organised by transnational companies or networks, and as financial capital moves instantly across the globe, discussed in Chapter 1 of this book, also workers must reorganise, finding new ways of acting together across borders.

It is too easily assumed, however, that globalisation has its most far-reaching consequences in the transnational production sector and that therefore the objective conditions for transnational worker solidarity will typically develop there. I shall argue here that this is a simplified and partly misleading understanding of the effects of globalisation on worker strategies. I shall compare concrete cases of transnational solidarity endeavours in the production of goods with such efforts in transport, construction, distribution and other private services and in the sphere of social reproduction. In each of these three sectors, I will refer to three cases, most of them taken from this book.

Solidarity is the necessary basis for joint action by workers across national borders. It is not always there – and efforts to build joint action are stifled. It can be extended along many different lines. Basic to my analysis is a concept of solidarity in which mutual self-interests and shared identity are vital parts. I also assume that solidarity is shaped in action. Transnational solidarity will have strong leverage only when shared by rank-and-file workers.

Diverse challenges

In *manufacturing*, a core effect of globalisation is intensified competition between workers at production sites in different countries. Management's threat to relocate production undermines the bargaining position of workers. The case of auto workers in Opel/GM may be taken as typical of this situation. Magdalena Bernaciak in Chapter 3 of this book investigates different stages of this case, seen

from the perspective of Polish unions. At the end of the 1990s, production sites in five different European countries were played off against one another in a competition for investments and jobs. In the first phase after the opening of a factory in Polish Gliwice at that time, the Polish unions regarded the fight for investments their top priority. In 2004 they signed a concessionary agreement with management and thereby gained the Opel Zafira investment at the expense of the German plant in Bochum. Having secured this investment however, the Polish unions then redefined their priorities, giving improved wages and working conditions a more prominent place. They increased their participation in efforts of inter-union collaboration and in 2005 agreed to the Delta group commitment not to enter into separate negotiations with management before this new investment decision was taken. However, conflicting interests continued to play a role and on several occasions the position of *Solidarność* still diverged from that of the Western European unions. Tensions remain and in the new wave of restructuring unleashed by the global financial crisis, transnational labour solidarity among auto workers is under heavy pressure and national protectionist forces gain strength.

The challenge for workers in a subsidiary company with no genuine union is presented by Tore Fougner and Ayça Kurtoğlu (Chapter 8). On 26 September 2006 more than 80 women workers went on strike at the Novamed factory in Turkey's Antalaya Free Zone. The strike followed upon a drawn-out dispute on working conditions and the right to organise at Novamed – a subsidiary of the German-headquartered company Fresenius Medical Care (FMC), which is one of the world's leading providers of dialysis products and services. The battle lasted for over a year and the settlement meant at least partial victory for the workers. However, the position of the union, which is affiliated to Turkish Petrol-İş, is still fragile and management remains hostile.

A third case from the production of goods but from a factory situated at the southern end of a global value chain is the Jaqalanka case from Sri Lanka, as presented by Samanthi Gunawardana (Chapter 7). The successful strike in 2003 at the Jaqalanka International apparel factory in Sri Lanka's Katunayake Free Trade Zone (KFTZ) was at the time understood as a victory in the whole zone, a culmination of a global campaign. The campaign focused on the non-recognition of the union and thus on freedom of association. Its successful outcome provided hope about the viability of such campaigns. The resulting recognition of the Free Trade Zone and General Service Employees Union (FTZGSEU) as a formal bargaining agent of workers was heralded as a landmark case of local and global organising. However, the underlying conflict of interest between labour and capital persisted and the victory of the workers did not last. In March 2008 management announced the factory's closure and liquidation, along with two other factories. One thousand and four hundred workers, the majority women, lost their jobs. The reason for the closure given by management to union representatives was that they could not absorb high labour costs. The price that one of their major clients, Nike, was paying them was getting lower and lower.

The successful Jaqalanka strike and the subsequent close-down of the factory show how South-Asian garment workers, just like auto workers in Europe, are

played off against each other. But the Jaqalanka case is different in several respects. First, this factory is situated at the lower end of a global value chain. Workers at Jaqalanka are surrounded by a sea of unemployment and have practically no social security whatsoever. Secondly, management here is completely opposed to unionisation and the basic issue of the struggle is therefore the right to organise. Plant closures have often followed attempted unionisation. Where factories have not shut down, management has fired, harassed and intimidated, blacklisted or moved union members and leaders from their factories. Over the past two years according to Gunawardana, workers at Smart Shirts, Brandix, Allitex, Star Garments, New Design Manufacturing, G.P. Garments, and Workwear Lanka – all producing garments for big brand name companies – have faced harassments, threats to their lives, dismissal, forced contracts with lower wages and factory closure. The Opel workers in Europe may face factory closure and unemployment but not these harassments and threats. And third, like in the Novamed case, these female Jaqalanka workers are not only exploited as workers but also as women. The need for labour organising here extends beyond the workplace to encompass living quarters, and to take into consideration the totality of women worker's experience.

In *private services* the challenge is even more diverse. Our first case here comes from building and construction. The Berlin labour market for building and construction after 1990, with its huge influx of foreign posted workers, provides a striking example of competition at the work-place itself (Erne, 2008: 90–94). In 2000, out of nearly 90,000 construction workers in Berlin only 23,000 had permanent residence there, while 30,000 came from lower wage countries in Southern Europe and another 30,000 from Central and Eastern Europe. Most of the temporary Berlin building workers were employed by foreign companies and posted in Germany. Several German firms even set up Portuguese daughter companies in order to bypass German collective agreements. Thus, this case illustrates that construction workers from different countries on the same building site face a different type of threat of underbidding than do workers employed in the production of goods. The aim of the construction workers' union was to ensure that all work on the same site be regulated by the same collective agreement, namely that of the host country. The corresponding organisational efforts are still at an early phase, though. In a long-term perspective one can assume that situations of this kind will require much more far-reaching union responses, involving a rethinking of union culture and attitudes to others than home-country core workers.

Bus drivers on different sides of the Atlantic certainly do not compete directly, even if they work for the same firm. The buses will go where the passengers are. What can transnational solidarity mean to these bus drivers? The 'Driving Up Standards' campaign, or DUS, analysed by Jeremy Anderson in his doctoral thesis (Anderson, 2009), was initiated by the Service Employees International Union (SEIU) of the US and focused on British First Group. Through an array of legal and illegal mechanisms, including harassment and unfair dismissals of union activists, this company sharply resisted attempts by the SEIU and Teamsters to gain recognition. But British bus drivers acted in solidarity to support the struggle of their US fellow drivers. We shall soon see why.

My third case in the sector of private services comes from the South and concerns a branch of the so-called informal sector. The association ASSOTSI of street vendors in Mozambique, described by Ilda Lindell (Chapter 6) has two basic tasks. First, it carries out management functions in the market places. Its market committees provide basic infrastructure (water, toilets, and so on), make physical improvements (build shades), carry out maintenance work and organise security services and cleaning. Second, the organisation strives to defend vendors' rights to urban space and this battle is fought primarily against the local government. The street vendors form a significant group within the informal economy. They do not, as traditional unions, have a wage contract and an employer counterpart. But in the global South, core workers with fixed/term wage contracts are a minority among workers, although a majority in the existing unions. New organisational structures are often needed to defend the interests of non-core workers.

Typically, private services like cleaning, maintenance, local commerce, construction, hair dressing or local bus transports cannot be relocated but have to be provided where the customers are. At first glance it may seem as though globalisation would not have so strong impact in the private service sector, since the threat of relocation is typically not there. However, neoliberal globalisation affects these services in a number of other ways, including (1) that service workers are often employees or subcontractors of large multilateral companies (like First Group), (2) that these companies often import 'posted' workers from low-income countries to take up temporary jobs or projects in the host country (as the Berlin construction work case illustrates) and (3) that significant parts of these services are carried out in the unregulated or 'informal' economy (as is exemplified by the street traders in Mozambique). For bus drivers in the US, building workers in Berlin or street vendors in Mozambique, globalisation has very different effects both between them and compared to manufacturing. These three cases illustrate the extremely diversified effects of globalisation in the broad field of private services.

Not all service jobs are of this kind. By private services, I mean here those that are normally carried out as an answer to private needs, on a market basis, by private companies or entrepreneurs, be they huge multinationals like Wal-Mart or self-employed street traders like those in Mozambique. But there also exists an area of services which meet common or social needs, rather than just private ones. Drinkable water, maternal and child health care and education are obvious examples. These services are fundamental not only to the well-being of the individual but also to the survival of society. I shall refer to this sector as that of *services for social reproduction* (see Chapter 1 for a discussion of this concept). Such services have traditionally been regarded as a public good and a responsibility of local or national governments. During the last 20 years of neo-liberal hegemony however, strong efforts have been made to open them up to private profit-seeking. In Europe this has taken the form of deregulation, creating favourable conditions for private competition for public contracts and outright privatisation of public companies. In other parts of the world Washington-consensus deregulation policies, requested by international institutions and 'donors', have opened up even such basic necessities as water and land for an increasingly fierce competition.

My first case here concerns the struggle around the draft European Union (EU) directive on public procurement. The draft, as presented by the EU Commission in May 2000, focused on the lowest price as main criterion for awarding public contracts. The directive would prevent public authorities from requiring different competing firms that should all have collective agreements based on the level of such agreements in the host country. The effect would be to create conditions for competition where workers from different countries would be played off against each other here also, even for service sector work financed by public funding and carried out in the same country. The case, described by Andreas Bieler (Chapter 13) illustrates a rather unsuccessful effort by unions and social movements to influence this issue. A successful attempt to fight privatisation, the EMCALI case, is described by Mario Novelli (Chapter 11). On Christmas Day 2001, several hundred workers began an occupation of the headquarters of EMCALI, the public provider of water, electricity and telecommunications of Colombia's second largest city of Cali. The occupation was in response to a government announcement to privatise the company. Thirty-six days later the workers emerged victorious after all parties signed an agreement to keep EMCALI public. The third case from the sphere of social reproduction, described by Jane Lethbridge (Chapter 10), concerns South Africa, where the development of an alliance between Congress of South African Trade Unions (COSATU) and the major NGO campaign for AIDS treatment, the Treatment Action Campaign (TAC), was triggered by the lack of government action on HIV/AIDS. Let us now take a closer look at the responses by labour in these nine cases.

Varied responses of labour

An international division of labour is central to the establishment and consolidation of the present world order. In *manufacturing*, as we have seen, the predominant challenge is that production sites in different countries can be played off against each other in a threat to relocate production. The three cases from manufacturing illustrate two main steps in the responses from workers (1) to build unions and to fight transnationally for the right to organise (as in the Novamed and Jaqalanka cases) and (2) to form links of transnational collaboration and joint action on wages and working conditions, in defiance of the competitive challenge and the risk of underbidding (as most obviously in the Opel/GM case). The main counterpart of workers in the manufacturing sector is the management of the company. And the main tools of the workers are negotiations and, if necessary, industrial action. In using these tools, workers increasingly need each other's support, in solidarity. The auto industry and the Opel/GM case again seems to be a good starting point. As car factories in different countries are being played off against each other, auto workers today in many cases feel forced to make concessions in order to avoid losing jobs to factories in other countries. Even in strongly unionised countries like Germany or Sweden, national collective agreements alone can no longer fulfil the fundamental union task of preventing workers from being played off against each other. The risk for 'social dumping' or 'race-to-the-bottom' is obvious. The

push for building transnational solidarity is certainly strong here. However, the difficulties are equally forceful. The Opel/GM case, and many similar ones from the auto industry, shows that it is extremely difficult to achieve solidarity in action in situations when different production sites of a transnational company cluster have to fight each other for investments. This is even more when reductions have to be made at one production site or the other, as during the present global recession. A sense of shared identity as (in this case) Opel/GM workers may be there, and a united labour front might be a long-term win-win game for workers, but at a critical juncture these mutual long-term self-interests have weak leverage compared to the immediate opposing self-interests of protecting jobs at one's own work place.

We shall then turn to the other two cases from manufacturing. In their analysis of the strike in the Novamed factory, Fougner and Kurtoğlu (Chapter 8) first point out a number of factors that helped to bring about the comparatively successful outcome. The strikers got strong support from their families and the local community. The Turkish union Petrol-İş provided the strikers with regular and irregular payments as well as packages of food and other necessities and helped them with meetings and media contacts. Support from unions outside Turkey, including protest letters and solidarity visits, came mainly from those with which Petrol-İş was affiliated, like the German chemical worker's union IG BCE, the European Mine, Chemical and Energy Workers' Federation (EMCEF) and the global union International Federation of Chemical, Energy, Mine and General Workers' Union (ICEM). Support from women's groups was less institutionalised and came more spontaneously with a feminist union journalist playing an important role. Even if support for the Novamed workers did not on the whole add up to a unified and coordinated solidarity campaign, action from external unions nevertheless played an important role. 'If it was not for the close collaboration established between Petrol-İş and the external unions, the organising efforts would possibly have been undermined at an early point', researchers Fougner and Kurtoğlu conclude. And towards the end of the fight, headquarter management at the German-based mother company Fresenius Medical Care (FMC) were more or less forced by increased negative publicity to get directly involved. FMC, acting in a branch where publicity matters a great deal, was increasingly being portrayed on the World Wide Web and beyond as a company engaged in super-exploitation of women workers in Turkey. A meeting of FMC management with representatives of IG BCE, EMCEF and ICEM paved the way for the final settlement.

The global campaign in support of the successful strike in 2003 at the Jaqalanka apparel factory in Sri Lanka's Katunayake Free Trade Zone (KFTZ) included cross border pressure from anti-sweatshop movements like the Clean Clothes Campaign and the Fair Labour Association, along with international trade union confederations such as the International Confederation of Free Trade Unions (ICFTU, now ITUC) and the global union of textile, garment and leather workers. The campaign also occurred at an opportune time, when Sri Lanka was engaging in trade negotiations for the Generalized System of Preferences (GSP) concessions and when unions could argue that Sri Lanka should not be granted GSP concessions if manufacturers continued to violate core labour standards. The recognition of the

free trade zone union as a formal bargaining agent of workers was heralded as a landmark case of local and global organising but after the closure of the factory in 2008 the competition among garment producers has intensified.

As with the Opel/GM workers, the other two cases confirm that the *push* for building transnational solidarity structures is certainly strong in manufacturing. They also illustrate that transnational support for the right to organise is a powerful tool. But the difficulties are equally forceful. Taken together these first three cases show in important respects, production workers even have a more entrenched position than others. First, the competitive pressure is a strong limitation. If auto workers in one company go on strike, other car producers will sell better. If Jaqalanka workers get better paid, the company may lose its contract with Nike. Secondly, workers in manufacturing have different positions in the global division of labour. Workers are played off against each other mainly at the same level of the global value chain, like Polish and German auto workers or Jaqalanka and other Asian garment producers, subcontracted by a brand company such as Nike. But when workers are at different levels in a value chain, like the striking subcontracted Novamed workers and headquarter-organising German IG BCE, the situation is more complex. Competition is not a strong element here, but the solidarity of German workers with their Turkish sisters is in this case mitigated by a different set of mutual interests, which workers at headquarters share with the management side, such as avoiding bad publicity and achieving a competitive price for the end product. Third, these hierarchies in the production structure are interlinked with union hierarchies. The Novamed case indicates that the home-country union, which normally has a stronger position in union hierarchies, tends to give high value to its special relationship to the company management. This can weaken its readiness for mutual-interest-based solidarity with workers for the same company or its subsidiaries in other countries.

The *private service sector* presents a much more differentiated picture still. In response to the challenges on the Berlin construction market mentioned above, the German building workers union IG BAU made some efforts to organise also posted workers. Thus, IG BAU sponsored the creation of a multilingual European Migrant Workers' Union and it concluded a number of bilateral agreements with construction worker unions in other countries, providing for information exchange, mutual assistance and mutual recognition of membership rights. Furthermore, IG BAU and its European federation EFBWW lobbied the EU to adopt the posted-worker directive. Moreover, the European building workers were active in huge demonstrations aimed at removing the country-of-origin principle from the proposed service ('Bolkestein') directive. Thus, whereas cases like Opel/GM have made the European Metalworkers' Federation (EMF) initiate efforts to coordinate cross-country wage bargaining (Schulten, 2005: 274–89), the challenge for European building workers is much more workplace-based, emphasising local organising, and at the same time involves more of action towards the political decision-making arenas.

In the Driving Up Standards campaign the British bus drivers were able to mount considerable pressure on the mother-company in support of their US colleagues,

including the use of shares that they held in the company. What then made British bus drivers act in solidarity with their US fellow drivers? Even though they could not be played off against each other, there was an important element of mutual self-interest too. As union organiser Abdul puts it: 'if they are going to get away with it over there they will at some point try and introduce [these practices] over here . . . ' (cited in Anderson, 2009: 212). The legacy of trade union organisation in the bus industry also had a discernable internationalist signature, and solidarity with workers in distant places came easily to the British organisers, often having a Pakistani background. This dispositional capital was gained through their participation in the trade union movement during the 1970s, when a rhetorical internationalism held pride of place in the discursive armoury of a movement brimming with confidence. 'I am from the old days. I believe that capitalism has no barriers, and that the working class, trade unions should not either' (cited in Anderson, 2009: 212), as one of the British organisers states. Identification was also facilitated by the use of media. A T&G organiser in Sheffield tells Jeremy Anderson that as members were shown a video portraying the conditions of their counterparts in the US, there was a tangible sense of outrage: 'When you see workers working for the same company doing essentially the same job on very poor wages . . . People are being dismissed for trying to organise the trade union. . . . the power of the video is quite stark, . . . you do actually identify with those fellow workers' (cited in Anderson, 2009: 216). Basic importance was the loyalty and respect that organisers such as Taj and Abdul commanded as a result of their long history of representing members at the work place. The imagineer, writes Anderson in his analysis, emerges as a pivotal figure, as it is their ability and/or willingness to move between different imaginaries of solidarity that enables transnational organisation. And the ongoing viability of transnational union campaigns is likely to depend on the ability of trade unions to nurture new generations of locally situated activists with internationalist outlooks.

The street vendors in Mozambique opted for a worker identity and gained affiliation to the main trade union confederation of the country. But ASSOTSI is also a member of a recently created global network of associations and unions of street and market vendors, StreetNet International (www.streetnet.org.za; 05/11/2009). The counterpart of these street vendors, however, is not an employer but mainly local government. For them, transnational support has had the effect that governments realise that they are dealing with groups that are backed by an international movement. International exchanges have also provided to those involved in the organising struggle with a widened consciousness, a sense that they are part of a larger force. Having gained strength, they are asserting themselves as the backbone of national economies as well as a major source of local government revenues.

At a closer look, and contrary to the assumption that transnational solidarity would typically develop in sectors of transnational production, one may well argue that the consequences of globalisation for workers and unions are potentially even more far-reaching in the private service sector. In manufacturing, such as in the auto industry, Swedish or German or Polish unions can be organised basically the same way as before. They 'just' have to find ways of coordinating their action

transnationally facing a threat of relocation. But in the sector of private services, basic ideas about union organisation and identity are challenged. German building workers in Berlin must try to organise workers from Portugal, Poland and Ukraine, temporarily posted in Berlin. In order to regulate working hours and wages and prevent underbidding, they must create renewed local union structures, involving posted workers and other groups outside the union's traditional core group. They must reach out to subcontractors, employing undocumented migrants for sub-wages, often performing the low-paid and most dangerous parts of a construction project. Here, new union structures have to be developed not just on top of the existing ones but at the local level. In addition, the counter-part in the private service sector is in many cases not a private employer of a traditional type. The aim of unions and union-like associations like ASSTOSI is rather to influence various structures of government. Street traders in Mozambique are self-employed, they organise the site of production (the market place) and they do not negotiate with an organisation of employers but with local government – and yet their association is affiliated to a national confederation of labour.

Our third field of investigation concerns *services for social reproduction*. In the struggle against the proposed European Public Procurement Directives and their focus on lowest price as sole award criterion a Coalition for Green and Social Procurement was created with the European Federation of Public Service Trade Unions (EPSU) and the European Environmental Bureau (EEB), a coordinating body for environmental movements, as driving forces. The Coalition was quite successful in getting its views understood and accepted in the European Parliament, which during its second reading of the directive more or less fulfilled all the objectives hoped for by the Coalition. Ultimately however, since the Commission and the Council of Ministers have strongest power in the EU, the impact of the campaign on the eventual directives was rather weak. The negative end-result confirms that unions and green and social NGOs, when lobbying inside the Brussels structures of the EU, have a rather weak position. And attempts to move from lobbying to broader mobilisations, including public demonstrations, were not put into practise. Members of the Coalition did not share more fundamental understanding of the aims of the struggle, and no alternative project was developed. For good reasons, the word solidarity does not appear in Andreas Bieler's account of this joint campaign (Chapter 13). It was rather a reasonably successful effort to form an alliance of a bunch of interests, which were different but could well be combined, and to lobby together on a joint platform.

It is interesting to compare this case not only with the fight against the service directive, mentioned earlier, but also with the dock workers' campaign against the proposed EU deregulation of the docks, described by Peter Turnbull (2007: 117–36), where strikes and large-scale mobilisations were used successfully alongside with lobbying. The driving force behind the dock workers' campaign was a strong and immediate mutual interest that could mobilise rank-and-file members. Workers could easily feel the threat of being played off against each other and a common identity was forged around the slogan 'I am a Docker'. These elements were not present in the Coalition for Green and Social Procurement.

In the successful EMCALI case (Chapter 11) on the other hand, the solidarity building process behind its victory started many years earlier. Already in 1995 a shift of strategies took place inside the EMCALI workers' union when a new leadership took over and an anti-privatisation policy was adopted. The new leadership's solidarity building strategy had four main elements. First, there was a need to build alliances between EMCALI workers and the local community, since people in the local community regarded EMCALI workers as part of the problem rather than as part of the solution. Now, all EMCALI workers gave up one weekend per month to carry out repairs on infrastructure in the poorest area of the city. The resulting shift of attitudes was fundamental during the successful occupation. Organisations and individuals of the local community blocked roads, joined marches and demonstrations and provided material and political support for the union during the fight. The second element of the union strategy was an alternative development plan for efficient management and delivery of public services. The third was the development of a hard core of members and sympathisers, willing to put themselves at great personal risk for instance in the occupation of buildings. Colombia is certainly one of the most dangerous countries in the world for a trade union activist. The fourth element of the strategy was transnational solidarity networks. After the assassination of 17 unionists, a prominent human rights activist set up a Human Rights Department inside the union. Training courses in human rights and solidarity work were developed and national and international network contacts were built. Links were constructed, in particular with British unionists and the British Trades Union Congress (TUC). In the end, these different alliances created a joint mobilisation of organised labour and local forces around an issue that was defined as broader than 'just' jobs and working conditions. A specific feature of this case was the alternative management plan, where the union actually started a process towards worker control of production, an emancipatory shift questioning the established relationship between labour and capital in the production process.

Finally, in the South Africa HIV/Aids campaign (Chapter 10), the trade union confederation COSATU worked with the high profile NGO TAC to campaign for people's right to treatment for HIV/AIDS. The coalition had great political significance, sometimes even considered to have the potential to threaten the relationship of COSATU with the African National Congress (ANC) government and the communist party. One of the factors contributing to the success of the partnership was the recognition by COSATU that access to HIV/AIDS treatments was a crucial issue for its membership both now and in future. It had become a collective bargaining and health and safety issue and so a core trade union concern. By working with the TAC coalition, COSATU also developed an important partner in its struggle for wider social justice issues. Education played an important role in bringing the trade union and NGOs together. Transnational networks provided important support for both COSATU and TAC. Worker and health concerns were successfully integrated in the campaign. For instance, in 2007, TAC took legal action against the sacking of 41 health workers from a clinic in Khayelitsha, near Cape Town. TAC argued that the dismissals were 'a violation of patients' constitutional rights to life and dignity' and 'were an unlawful and unreasonable curtailment of health services'.

The three cases from services for social reproduction illustrate their distinctive character. Such services tend to be regarded as rights rather than as commodities. It is seldom argued that hair-cuts or taxi rides should be distributed equally among the population, based on need and disregarding ability to pay for it. But that medical treatment should be given on equal terms to all those in need, irrespective of means, is even part of the moral code of the medical profession. Most Governments would also at least in principle agree that basic education should be provided to all children, whatever the economic and social status of their parents. And even the poor should have drinkable water. This ideological distinction of such services provides a special link to trade unions in two ways. First, professionals in this sector and their unions – doctors, nurses and assistant nurses, teachers and many others – often have a social dedication and are committed to reaching out also to under-privileged groups. And second, unions outside these professional groups also usually organise and struggle politically for the interests of the less privileged groups in society. Thus, a potential ideological link – a struggle for social justice on the side of the underprivileged – often exists between unions, on one hand, and consumer groups or popular movements fighting for free or equitable access to such common goods as health, water and basic education, on the other – a link that does not usually exist in the field of purely private services.

In all three cases from services for social reproduction, we see unions entering into alliances with other social movements. The cases also illustrate the importance of the ideological dimension. The campaign against the draft EU Directives on Public Procurement did not have a strong ideological component, it did not involve a broad rank-and-file mobilisation and it was not very successful. The South Africa HIV-Aids case, and even more so the successful EMCALI struggle against water privatisation, on the other hand, demonstrate the strength of a joint ideological front. The sphere of services for social reproduction clearly offers possibilities for unions to gain weight in public opinion through ideologically based interaction with other groups in society.

The character and scope of the sector of social reproduction is however continuously being contested. In fact, one of the most prominent traits of neoliberal globalisation has been a drive for the privatisation of large parts of this sector. And the position of unions in relation to this drive for privatisation has so far been divided and often cautious. Some unions (like the Swedish municipal workers) have opted for a neutral position on the ownership issue, arguing that the union's task is to cater for the interests of their members whether in public or private employment. Increasingly, however, public sector unions have formed alliances with other social movements, such as movements for human rights, for the rights of indigenous groups or for the protection of the environment, in order to join forces with them in a struggle against neo-liberal deregulation of services for social reproduction.

Manufacturing as the primordial case

True, workers in manufacturing traditionally, have fairly strong union structures nationally, not only in the North but also in newly developed countries like South

Africa, Brazil or South Korea. Through intensified competition and threats to relocate production they are very much exposed to the challenges of globalisation. It could therefore be assumed that they would be the ones to pave the way for new transnational union structures. Typically, workers in the same manufacturing company need to find ways of negotiating and, when necessary, taking industrial action together across national borders. This is already a formidable organisational task, taking into account the differences between countries in labour law, negotiation systems, and union cultures. A union structure for joint transnational negotiations, and possible joint industrial action against the management of a transnational company like Opel/GM, is indeed a far-reaching challenge. But the challenge is wider than that. Competition between production sites does not take place only within one company. If Opel/GM auto workers resist the pressure to make concessions, while other auto workers accept, other companies may sell better and the resisting workers may lose their jobs. This happens right now to auto workers and it was exactly what happened in the Jaqalanka apparel factory case. The wider challenge therefore is to coordinate union action across a whole sector, at least regionally, like between auto workers in Europe or garment industry workers in South-East Asia (see also Chapter 9). New bargaining structures, new regulations for cross-border strikes and even joint regional consultation procedures, possibly co-determination, for whole sectors will probably have to be developed. The challenge for workers in manufacturing is indeed great.

Nevertheless, the way production workers are organised at factory level does not need to change fundamentally as a result of globalisation. And new alliances with other social movements are often not so helpful here. Certainly even manufacturing unions need renewal; many have stagnated and need reinforced vitality. Activity levels have dwindled; distant institutional ownership and fluid transnational chains of production have made local factory unions feel more powerless than before. Nevertheless, in manufacturing, a local factory union will have basically the same shape as before globalisation. The basic organisation and philosophy remains. Production sector unions therefore often think that what is needed is 'just' an additional transnational union structure on top of the local and national ones. They often argue that globalisation is nothing new and that their jobs have always been exposed to international competition.

It is therefore vital for the union movement to see that the challenge for auto workers in the North is not typical of the challenges for all kinds of workers all over the world. And in important respects, production workers have a more entrenched position than some other groups of workers. First, the competitive pressure is a strong limitation. If auto workers in one company go on strike, other car producers will sell better – whereas if building workers in Berlin, where production must take place on the site, join together in a strike, all construction there will stop and it cannot usually be replaced somewhere else. Secondly, the auto workers of Opel/GM are typically not able to mobilise outside support the way for instance EMCALI workers did. They fight alone, more or less, and are not able to mobilise women's groups, consumers or human rights activists, as the EMCALI groups or the Jaqalanka women workers were able to do.

In fact, increased competition between workers as a result of the threat to relocate is not the archetypical challenge to labour posed by globalisation. There is a great variety in circumstances and outcomes both inside manufacturing and in private and public services. Workers' responses are indeed multi-varied and that of unions in manufacturing is just one of many. Nevertheless, there is a strong tendency in the North to regard the situation in manufacturing as typical. It resembles previous union struggles at the national level in the North with factory workers as the back-bone of a union movement. But this parallel should not be overstated today. Basing concepts of worker solidarity only on the experiences of core workers in manufacturing can rather be a hindrance for the development of transnational solidarity. The understanding of what a union is and how it should act must be open to new experiences. These insights stand in stark contrast to a structure in the existing global unions where member organisations from the North hold nearly all key leadership posts. Unions in the North often take their own Northern experience from a period of social contracts as the guiding principle for all kinds of unions at any time. Cases like that of the auto workers are often seen as the archetypal pattern of labour solidarity also in today's capitalist world economy. But the cases of building workers in Berlin, street traders in Mozambique or Emcali workers struggling for everybody's access to water are just as important examples of transnational worker solidarity as the Opel/GM case. The danger of taking previous union experiences from the North as the overriding guideline for the future is clearly exposed in the Ericsson case analysed by Jonas Sjölander (Chapter 4). The Swedish Metal workers met their Colombian colleagues with a preconceived idea about social contracts, formed by experiences inside a Swedish welfare-state pattern. The failed attempt at union solidarity between Ericsson workers in Sweden and Colombia also shows a forceful hierarchical pattern, similar to that of the Novamed case. The Ericsson company had (and still has) its headquarters in Sweden. The Swedish Metal workers, with a much stronger position than the Colombian ones in the union hierarchies, certainly felt a degree of shared identity with their Colombian colleagues. But they did not really identify a mutual interest in joining forces with them. Rather, they saw their main own interest in maintaining good relations with company headquarters in Sweden, as a way of protecting the interests of their own members in the home country, and in being loyal to the International Metal Workers Federation (IMF), to which the Swedish but not the Colombian union was affiliated.

Part of a global struggle?

This book is a study of cases. In my experience, you can present a concise, well-written theoretical analysis on labour and the challenges of globalisation to a group of unionists and they will say: 'Interesting. But what does it mean to us?' If, on the other hand, you present a concrete case, even if from a different sector, the same group of unionists will immediately compare it with their own situation and start discussing alternatives. In such a discussion, an understanding of power structures and conflicts of interest, as outlined in Chapter 1, will be needed as a

basis for comparisons and analysis of alternatives. However, the point with a study of cases is not only that it is more accessible to discussions among unionists. As this chapter tries to show, it can deepen the analysis. Three features stand out here. (1) The auto industry case is not the paradigmatic one; conditions for solidarity at lower ends of the global value chains and in private services or services for social reproduction are just as important. (2) Union hierarchies interact with structural power differences along global value chains. And (3) a reinforced ideological basis, where services fundamental for social reproduction are seen as rights and not as market commodities, can both strengthen unions and underpin links to other social movements.

Joint action requires an element of solidarity. Mutually shared interest is always an important element when unions are formed. An outsider might simply regard unions as interest organisations. But it would, as I see it, be completely mistaken to argue that possibilities for transnational worker solidarity can be fully answered by an analysis of mutual versus divergent self-interests. Many years of experience from inside a trade union movement tell me that union solidarity is something much more than joint action for mutually shared interests. A sense of shared identity plays just as important a role. There are so many divergent or conflicting interests already inside a national union movement. Why would, for instance male metal workers support special wage increases for female assistant nurses? Will such measures not increase taxes and threaten export-oriented metal-worker-jobs? And yet, they do identify and (under benign circumstances) give each other support. Indeed, what makes working in the union movement so exciting is precisely this sense of belonging together, going beyond mutual self-interest. You can call it an imagined community (Benedict Anderson). It is difficult to pin-point the exact content of this shared identity or imagined community but one element is certainly a perception of being subordinated or under-privileged, of belonging to a proud but underprivileged working class ruled by a privileged few. We will revert in Chapter 16 to solidarity as a driving force. Transnational worker solidarity will not develop according to any type of theoretical blue-print but in a practical step-by-step process. What we researchers can do is to offer some analysis for reflection, as the process unfolds.

16 Conclusions

A variable landscape of emerging transnational solidarities

Andreas Bieler and Ingemar Lindberg

Autoworkers from factories in different countries in the same company create a solidarity pact to avoid being played out against each other. Textile industry workers in Asia start fighting for a common floor wage. Women workers in South Asia's garment industry create supportive networks and help each other in fighting both employers and patriarchal practices. Truck drivers from neighbouring countries in Europe, driving through each other's countries, start organising together (Sahlstrom, 2006: 55–60). Workers, peasants, street traders and small entrepreneurs join hands in fighting for water as a public good. In these, and hundreds of other cases, we witness today a broad range of organising initiatives develop, as workers (understood in a broad sense) engage with an increasingly globalised capitalist economy.

In *Labour and the Challenges of Globalisation* (Bieler *et al.*, 2008a) we surveyed the position and situation of national labour movements around the world on globalisation. The purpose was to find out how they perceived the impact of globalisation, but also their possible strategies in times of global restructuring. More international cooperation with other trade unions was everywhere regarded as necessary in order to meet the new challenges. But it was obvious that nationally based unions were reluctant to really transform nationally based organisational structures from previous periods. A need for organising increasing sectors of informal workers was also acknowledged, but we saw great difficulties in actually implementing this ambition. Possibilities for a broadening of the social basis of resistance through cooperation with other social movements were discussed as part of the answer to new challenges, but here too we saw a good deal of reluctance on both sides. We also identified two main strategic tendencies in today's labour movement (Bieler *et al.*, 2008c). The dominant Decent Work initiative has a strong organisational basis in the International Trade Union Confederation (ITUC) and the global unions. It tends to organise mainly core workers and, while challenging neo-liberal ideologies and practices, its main aspiration can be said to aim at a kind of replication at the international level of the social partnership ideology of Northern unions in a previous phase of capitalism. We saw signs of a different strategic tendency, relying more on broad mobilisations and based on a broader understanding of the working class, taking also into account the exploitation of the environment and in the sphere of social reproduction and organisationally going

beyond the traditional worker to include also those in the informal sector in a broad sense. And we noted that in many concrete cases these two tendencies could be combined, rather than opposed to each other.

In the present volume, in an effort to move beyond these two tendencies, we have chosen to focus on experiences of concrete cases of transnational solidarity. Through an analysis of successful as well as failed instances of joint transnational action, our intention has been to draw out more clearly the possibilities to challenge neo-liberal globalisation as well as become aware of problems in these endeavours. Current analysis of globalisation tends to outline consequences for workers and unions rather than seeing them as actors, able to influence structures and power relations. But there are also weapons and tools in the hands of workers. It is obvious that the challenges of globalisation will make necessary new or renewed union structures, where workers can act together across national borders. By focusing in this volume not on general overviews but on cases from different sectors and different parts of the world, we can illustrate the diversity of challenges and the necessary variation of responses. We can see cases from manufacturing, where production units like auto factories are played off against each other, but also cases from private services, including construction and transport, where new ways of organising must give a voice to temporary immigrants and informal workers. We can see how Silver's (2003) three potential forces in the hands of labour – marketplace bargaining power, workplace bargaining power and association power – have different leverage under varying conditions. In analysing cases from the field of services for social reproduction in particular we can see how mutual self-interest and a joint ideological basis can pave the way for new types of collaboration between unions and other social movements. In the following, we will identify some of the core insights of this volume and discuss potential key elements of a future strategy for labour.

Varying forms of union cooperation in different sectors

Trade unions' traditional role focused predominantly on strategies to keep wages out of capitalist competition. In order to safeguard the interests of their members, trade unions had the task to ensure that workers did not compete with fellow workers over employment, as this implied the danger of downward pressure on wages and work related conditions. Within the industrialised countries during the first three decades after the Second World War, in a situation of full employment and production being predominantly organised at the national level, or at least with a national base, trade unions were quite successful at that. Workers made significant gains in the form of wage increases and an expansion of the welfare state. Globalisation and the transnationalisation of production, however, changed the balance of power between capital and labour. Unions in transnational production sectors were the first to realise that they had lost control over capital at the national level and were no longer able to keep wages and working conditions outside capitalist competition. It could be argued that transnational solidarity and cooperation between trade unions is more likely in those sectors, in which production is

organised across borders (Bieler, 2006: 38–39). Bernaciak's case study of trade union interaction between the various GM production sites in Europe with a specific focus on the factory in Poland represents such a case (Chapter 3). In view of the 'beauty contests' over new investment organised by GM amongst its various production sites in Europe, it would be logical for trade unions to cooperate in order to avoid that workers underbid each other through wage concessions. However, as Bernaciak outlined, as long as direct competition over future investment between different production sites was involved, Polish trade unions rejected demands for solidarity and negotiated concession agreements with management. Only once Polish workers felt secure in the profitability of their production sites, did they cooperate with workers from other countries. In short, solidarity is more needed but also more difficult when there is direct competition between different production sites. This is echoed by Fougner and Kurtoğlu's case study of the strike of female workers at Novamed in Turkey (Chapter 8). Support by the German Chemical Workers' Union (IG BCE) as well as the European Mine, Chemical and Energy Workers' Federation (EMCEF) and the global union International Federation of Chemical, Energy, Mine and General Workers' Union (ICEM), including direct discussions with Novamed's parent company Fresenius Medical Care (FMC) in Germany, was strong in a situation where there was no competition between German and Turkish workers over employment.

Sjölander's study of transnational trade union cooperation within the Swedish TNC Ericsson in the late 1970s and early 1980s (Chapter 4) also indicated that while the transnational production structure makes intensified contacts between different national unions highly likely, successful transnational solidarity is not automatically the result. Rather than direct competition over employment, this case illustrates the continuing importance of national industrial relations systems. In their response to requests for help by the Colombian trade union against exploitative conditions within Ericsson's production site in Colombia, Swedish unions placed their recommendations on their own social-pact-experience from Sweden's 'historic compromise'. They asked the Colombian trade unionists, first, to affiliate themselves with a union, which was a member of the International Confederation of Free Trade Unions (ICFTU). While this may have been logical in a Swedish context, it made no sense in Colombia, where the respective unions were perceived to be employer friendly unions. Second, they advised them to focus on negotiations with management. Nevertheless, what had worked well in Sweden, where labour had been able to balance capital's power in society, was inappropriate for colleagues' struggle in Colombia, where capital, in strong alliance with the state, was much more powerful vis-à-vis labour. The fact that the Swedish trade union could determine the conditions of active support also reveals deeper structural obstacles connected to the economy. As indicated in the Introduction to this volume (Chapter 1), the capitalist economic system is characterised by fierce competition as well as continuous efforts to establish structures of monopolistic or oligopolistic dominance. Structures of the global economy create tensions between workers in the centres and the various peripheries. In a situation of uneven development, in which the Swedish union was much stronger than the Colombian union, the latter was in no

position to change the position of the former. This can also be observed in the case of the strike at Novamed in Turkey (Chapter 8). When Turkish colleagues asked the IG BCE to put more direct pressure on FMC to negotiate a Global Framework Agreement, the IG BCE declined as it considered such a more aggressive strategy to be counterproductive for its traditional focus on social partnership and dialogue within the particular conditions of the chemicals sector in Germany.

Thus, in manufacturing, where often different production sites are played out against each other, the push for solidarity action is great but competition is simultaneously a strong restriction. The key issue is how to devise strategies, which can successfully avoid downward pressure on wages within the general capitalist system characterised by competition. Workers in manufacturing traditionally have fairly strong union structures nationally, not only in the North but also in newly developed countries like South Africa, Brazil or South Korea. Workers in the same manufacturing company need to find ways of negotiating and, when necessary, taking industrial action together across national borders. This is already a formidable organisational task, taking into account the differences between countries in labour law, negotiation systems, and union cultures. A union structure for joint transnational negotiations, and possible joint industrial action against the management of a transnational company like Opel/GM, is indeed a far-reaching challenge. But the challenge is even wider than that. Competition between production sites does not take place only within one company. If Opel/GM auto workers resist the pressure to make concessions, while other auto workers accept, other companies may sell better and the resisting workers may lose their jobs. The wider challenge, therefore, is to coordinate union action across a whole sector, at least regionally, as for example between auto workers in Europe or garment workers in South-East Asia. New bargaining structures, new regulations for cross-border strikes and even joint regional consultation procedures, possibly co-determination, for whole sectors will probably have to be developed in order to avoid that workers underbid each other in competition for jobs. Jeroen Merk in Chapter 9 analyses the apparel industry in South-East Asia with its highly fragmented global commodity chain, buyer-driven by large retail TNCs such as Wal-Mart. The strategy adopted by the Asian Floor Wage (AFW) campaign is to identify a minimum wage in the various countries by calculating minimum levels for decent wages in each country, enough to provide basic necessities, like food, housing and water. The goal is precisely 'to prevent wage competition'. Fundamental to the campaign is the right to organise. It will also aim at building solidarity linkages with workers along the supply chain, active in transport and logistics, warehouses and retail trade as well as at involving consumers. It is an attempt to avoid that workers are pitted against workers despite the transnationalised and fragmented nature of the production process. A different strategy towards the same goal, more top-level and without consumer involvement, has been initiated by the European Metalworkers' Federation (EMF) since the late 1990s, in which it strives to co-ordinate national collective bargaining rounds at the European level by advancing a common formula of inflation plus productivity increases as the objective for all national negotiations. This equally attempts to take wages out of competition despite national diversity (Schulten, 2005).

The challenge for workers in manufacturing is indeed great. It is, however, vital for the trade union movement to see that the challenge for auto workers in the North is not typical of the challenges for all kinds of workers all over the world. Already a comparison with a case from manufacturing in the global South shows how such a case is different in several respects. Analysing the case study of Jaqalanka by Samanthi Gunawardana (Chapter 7) Ingemar Lindberg points to crucial differences (Chapter 15) with transnational manufacturing in the North. In the South, the lack of basic trade union rights as well as the generally high level of poverty and the exploitation of female workers in patriarchal structures implies different and additional challenges for labour strategies and their attempt to avoid competition between workers over jobs through wage concessions. Moreover, the situation in services, including construction and transport, is also different, sometimes both more challenging and more promising. In relation to the Services Directive and its country-of-origin principle, the Polish unions were not supporting the famous ‘Polish plumber’, who figured so much in over-heated Western European discussions. Bernaciak (Chapter 3) points out that a liberalisation of EU service markets based on the country-of-origin principle would have been beneficial mainly to non-unionised workers, going to Western Europe and working for lower wages, outside the rank-and-file of Polish unions. As there was no direct competition between unionised workers, the support by Polish unions for the position of the ETUC was never a problem. In transport, Mac Urata (Chapter 5) highlights the potentially important role a global union federation can play in revitalising rank and file activism as a basis for transnational solidarity. The Action Day Campaigns around the slogan ‘Fatigue kills’ by the International Transport Workers’ Federation were crucial in contributing to a wider understanding of common problems faced by transport workers in all countries and, thus, in building new solidarities across borders.

Cooperation between trade unions and social movements

Several of our cases highlighted the importance of cooperation between trade unions and other social forces in order to enlarge the social basis of resistance. Yet, the relevance and importance of such cooperation differs from case to case.

Trade union – social movement cooperation in global commodity chains (GCC)

When discussing likely union strategies in global commodity chains, Anner argues that ‘to the extent that producer-driven chains involve high-end sectors, such as automobiles, where employment is predominantly male and extreme forms of exploitation are less common, labor will be less inclined to form alliances with international human rights, consumer, and women’s groups’ (Anner, 2003: 608). This is confirmed by Bernaciak’s case study of cooperation between trade unions in GM’s European production sites (Chapter 3). Here, the focus was exclusively on trade union interaction without any involvement of other social movements. Anner

also hypothesises, however, that ‘since control lies on the retail and brand-named company end in buyer-driven chains, labor is more likely to form alliances with non-labor, consumer-oriented organizations’ (Anner, 2003: 608). In line with this hypothesis, the Asian Floor Wage campaign (Chapter 9) includes in addition to local and international trade unions also consumer groups in industrialised countries putting pressures on big brands to support living wages and trade union rights in those companies, which produce for these brands.

Trade union – social movement cooperation in service sectors

The cooperation between trade unions and social movements is, however, more likely and immediately useful in those areas, where workers in the production of services and users of those services are equally affected. Instances of privatisation of public services such as health care and the provision of services such as water and electricity provide good examples in this respect. Lethbridge’s analysis of health care reform in El Salvador (Chapter 10) makes clear how local resistance against privatisation can be based on a broad coalition of trade unions and social movements representing users. Her analysis of the cooperation between the Treatment Action Campaign (TAC) and the Congress of South African Trade Unions (COSATU) for access to HIV/AIDS treatment in South Africa also shows how common concerns in the area of health care provide the basis for solidarity between trade unions and NGOs. Equally, Novelli’s study of resistance against the privatisation of EMCALI (Chapter 11), the public provider of water, electricity and telecommunications in the Colombian city of Cali, also confirms the potential of cooperation between trade unions and social movements against neo-liberal restructuring. The moment trade unions are able to go beyond their direct concerns at the workplace and support wider community issues, the support of social movements and the community more widely is much easier to secure. The fact that EMCALI employees gave up one of their weekends in order to repair infrastructure in deprived areas made the local population much more sympathetic to their demands. And in the struggle for trade union recognition in the apparel factory Jaqalanka in a Free Trade Zone in Sri Lanka the local Women’s Centre played a key role in the process, as Gunawardana highlights in Chapter 7. Resistance happened when worker dignity was compromised, when the production process was in crisis, or workers felt compelled to take action to address injustice and unfairness. Intersections of class, worker identity and friendship shaped the character of solidarity action on the factory floor. In the company of older, more experienced workers, women took collective action. The conflicts were not just for the hours they were in the factory.

Social movements and the problem of pursuing single issues

Just as the struggle of female workers in the Free Trade Zone in Sri Lanka, the case of Novamed in Turkey shows the important role women’s groups played in supporting the strike of predominantly female workers through alerting the

media (Chapter 8). At the same time, however, the latter case also demonstrates hindrances of cooperation between trade unions and social movements. Turkish women's groups mainly supported the strike at Novamed, because they perceived it to be a women's struggle against patriarchal structures. The moment this was no longer a prominent issue, their involvement in the campaign lessened. And even during their active support of the strike, their efforts were more parallel to trade union activities rather than joint activities. As mentioned in the Introduction to this volume (Chapter 1), social movements also have to open up themselves to trade unions and need to pursue agendas beyond single issues. A stronger link would have been created, had the struggle against patriarchal structures been combined with a struggle against exploitation at work, whether it affects female or male workers. A similar single-minded focus was identified by Bieler in Chapter 13. Rather than regarding the struggle over changes to the draft Public Procurement Directives as a struggle against restructuring of the EU public sector more generally, green NGOs only got involved for specific, rather narrow environmental concerns. This more limited approach was then, however, also responsible for the Coalition for Green and Social Procurement's inability to mobilise support for its demands more widely. Equally, trade unions are also in danger of pursuing single issues and are equally challenged to look at problems beyond the work place in order to further cooperation with social movements. Wahl's analysis of pro-welfare state alliances in Norway (Chapter 12), on the other hand, illustrates how trade union – social movement campaigns can be successful, when they focus on the issue of social power in society and attempt directly to counter capital's structural power more widely.

Spaces of solidarity

Developing transnational solidarity can be understood in terms of new and old arenas and spaces for worker action. In Chapter 11, Novelli makes an important analytical distinction between 'spaces of dependence', which are the local spaces where actual worker struggles take place, and the wider 'spaces of solidarity'. While 'spaces of dependence' usually are to be defended and strengthened directly by the workers concerned, 'spaces of solidarity' are the sites of agents of solidarity that directly involved worker movements might link up with such as fellow workers, NGOs and so on.

Novelli's own case in that chapter provides a good example. SINTRAEMCALI, the Colombian union, constructed a network of solidarity alliances across a range of geographical scales, which were aimed at securing, defending and extending particular local 'rights'. The realisation of these local 'rights' – to work in EMCALI, to deliver and consume public services, to adequate human rights and labour protection – were tied to a particular 'material' locale upon which the members of the movement existed and resisted, and it is this 'space' that can be understood as a 'space of dependence'. The network of alliances that can be understood as 'spaces of solidarity' were complex and multi-scalar, linking poor local communities who would face public utility price rises if privatisation went ahead, fellow trade

unionists who saw in SINTRAEMCALI's struggle a revindication of their own confrontations with the Colombian state, and international trade union activists who could relate to the negative effects of the privatisation of public utilities.

We agree with Novelli that this analytical framework can allow us to unpack the strategic nature of building solidarity, and how according to the specific character of each 'space of dependence' different 'spaces of solidarity' can be strategically constructed. We believe that, it can also be a useful tool to understand better the possibilities of cooperation between unions and other social movements.

The meaning of transnational

What do our cases suggest as defining traits of transnational solidarity? Let us first consider Novelli's statement (Chapter 11) that we need a better understanding of the relationality between material 'interests' and 'ideational' commitments to processes of solidarity. We need to understand how multiple solidarities might actually exist within one protest episode. Transnational solidarity implies a process of mutual support that is not confined within a single nation, but which extends over, or operates in more than one nation. Thus, it is a process that operates both within and beyond the nation state. The concept does not imply a prioritisation of the 'external' (beyond the nation) but it captures the sense of processes that do not necessarily begin and end within the confines of national borders. As Novelli also argues transnational solidarity is a process that can be both internal and external to a particular group, a process that is rooted in a sense of common interest and that potentially takes place both within and beyond the nation state. This conceptualisation of 'transnational solidarity' allows us to go beyond both methodological nationalism, that sees social processes as essentially beginning and ending at national borders, and an equally problematic methodological globalism, that posits the 'global' scale as being the primordial determining factor in labour struggle in this era of globalisation.

Human rights movements, for example, can play a crucial role in countries such as Colombia and El Salvador, where trade union activists are faced with death threats. See here the prominent role played by the Inter-American Human Rights Court (IAHRC) in the assistance of the strategy against the privatisation of EMCALI in Cali/Colombia (Chapter 11). At the same time, transnational solidarity groups must not become the main driver of actions. As Gunawardana (Chapter 7) indicates in her second case study, the top-down solidarity initiative by Oxfam and the Apparel-industry Labour Rights Movement (AlaRM) was unable to integrate the local beneficiaries of its activities into the process. When women's complex relations with their work (economic advancement co-exists with industrial exploitation) are lost during top-down transnational strategies, local mobilisation is less likely to be successful. The transnational dimension can play a crucial, supportive role but it is the local groups, who need to be at the forefront of the action. Production relations are constituted at the local level. As Merk indicates in Chapter 9 on the Asia Floor Wage (AFW) campaign, unless the campaign is rooted and supported locally, it will not be able to work.

And the meaning of solidarity

Richard Hyman argues (Chapter 2) that the malaise afflicting labour movements in much of the world today stems from the exhaustion of their old model of collectivism. In its traditional form, 'solidarity' was a slogan which easily matched a conception of a working class, which was not recognised as differentiated by gender, skill, ethnicity or other significant characteristics. How can we today understand the idea of solidarity if the old notion of an undifferentiated proletariat is abandoned? One answer is to make solidarity a form of ritualised profession largely detached from day-to-day trade union practise, which Hyman regards as being the case with most expressions of trade union internationalism. A problem is the lack of articulation between bureaucratic, institutionalised solidarity and a collective sense of mutuality. For unions to survive and thrive, the principle of solidarity must not only be redefined and reinvented. Workers on the ground must be active participants in this redefinition and reinvention.

How, then can a combination of mutual self-interest and deeper identification be developed between workers across national borders? The answer is strongly divergent in different cases. The identity may be working for the same company, like the GM/Opel case (Chapter 3) or the First Group case mentioned by Lindberg (Chapter 15). It can be an Asian female worker identity (Chapter 7). It can be a local identity, like when workers and other locals struggle together against the privatisation of their supply of water, which is broadened through identification and ideology to achieve support from activists in other parts of the world (Chapter 11). The interests and identities of workers are specific and differentiated. Workers occupy and form different places and roles in the capitalist world system and the global division of labour. And workers, like other human beings, are rooted in time and space, have nationality, ethnicity and gender; workers have multifaceted identities.

Therefore joint action and solidarity cannot be based on simple assumptions of a single, shared identity. Joint action across national borders and other kinds of different identities requires a kind of solidarity, which is based on what Hyman calls 'mutuality despite difference'. Such an understanding of solidarity is based on our inter-dependence resulting from the division of labour in society, creating a common destiny and an obligation of the strong to support the weak. The starting point, Hyman argues, must be a 'perception of communalities which extend, but do not abolish, consciousness of distinct and particularistic interests'. This type of solidarity would welcome diversity. Clinging, on the contrary, to former models of solidarity based on homogeneity, would mean increasingly to suppress the more differentiated concerns of women workers, members of minority ethnic groups and those on the margins of the labour market. The lack of articulation between bureaucratic, institutionalised solidarity and a collective sense of mutuality is, he continues, one reason 'why bodies like the ITUC and the ETUC pack so limited a punch'.

Getting there – unions as learning organisations

As Hyman also argues, trade unions need to redefine, perhaps even re-invent, their understandings of solidarity; and to do so they need to discuss again how to behave proactively and strategically. This is not easy, but there is at this stage a wealth of cases and experiences to learn from when it comes to new forms of transnational solidarity. Such experiences can foster ‘communities of interaction’ through which individuals share experience on a foundation of mutual trust, synthesising discrete understandings into a more coherent whole. Unions have to open up for new knowledge and different experiences to be truly learning organisations. A broad exchange of experiences is an important step towards new strategies. Literature on organisational learning tells us that organisations often do not know what they know. If information and experience are fragmented among a diversity of individuals and groups, without overall coordination, their potential is radically diminished. Unions must therefore be able to develop internal structures and processes to facilitate reflection over new problems and collective discussion of appropriate responses. They need to promote critical analysis and internal debates. Organisational politics normally makes this difficult, in unions as well as in other organisations, since it requires – to quote Hyman again – ‘those at the sharp end of organisational practices to challenge the policies and procedures defended by those in more powerful positions’. The prudent course in hierarchical organisations is normally to keep quiet.

Strategy is closely related to leadership. But it also requires appropriate structures for participation, involvement and self-activity at rank-and-file level. Local activism is necessary but not sufficient for effective union strategy. Fragmentation must be overcome through the functions of leadership, which is therefore a prerequisite for participative democracy to deliver beneficial results. Such leadership must be authoritative but not authoritarian and form a process rather than a hierarchy. There must be a complex dialectic between leadership and democracy. Hyman underlines that creative thinking, being essentially collective, is most likely when there is a leadership team from diverse backgrounds and with a range of organisational experiences. It is least likely when there is a homogeneous leadership group deeply embedded in bureaucratic routines. Successful organising requires an interconnection between ‘top-down’ and ‘bottom-up’ approaches.

While working on this study, we have indeed been fascinated by the rapid increase in efforts to build transnational solidarity both by unions and by other social movements that we can see today. This means that there is an on-going build-up of knowledge and experience which can promote learning as well as the development of strategies. We strongly believe that further case studies, like the ones that we analyse in this volume, could provide a useful contribution to this broad process of learning.

What future for global labour?

In conclusion, the present study seems to indicate first that what is needed today is not simply the establishment of a union structure and a negotiation system on a level above the local and national levels. In manufacturing such a structure may certainly be helpful, but in other sectors, different types of solidarity networks may be more useful. Overall, a more fundamental rethinking of the role and functions of unions is needed. They will have to include the most exploited and underprivileged groups, such as migrants and workers in the informal sector, who often do not even have a wage contract. They need to include groups, like street traders discussed by Ilda Lindell in Chapter 6, who do not have an employer counterpart. These new structures can only develop bottom-up from the local level and they will differ a lot depending on the specific context. The union structures that we need today cannot simply be based on models created a 100 years ago in the North. And unions everywhere but in the South in particular, where non-core workers are a majority, must be aware of the risk of organising mainly core workers, a tendency which has sometimes been described as a risk of organising a labour aristocracy (Pillay, 2008).

Second, both in manufacturing and in other sectors, unions in the North must understand and question the imperialist world order and its links to global union hierarchies. Just as unions have at national levels combined workplace based 'pure' union action with political struggle to transform a class society, so unions at this stage of globalisation must challenge a global class society, formed by imperialist economic structures and trade regimes that create world-wide structures of exploitation. Unions in the North, in particular, need to consider more in depth their views on, and their role in, the present world system. Mohanty (2003: 231–35) uses the perspective of 'situated knowledges'. She argues that scrutinising the world system from the perspective of its least privileged groups, such as women in the South, provides the most inclusive way of understanding its injustices. 'Beginning from the social location of poor women of color of the Two-Thirds World is an important, even crucial, place for feminist analysis; it is precisely the potential epistemic privilege of these communities of women that opens up the space for demystifying capitalism and for envisioning transborder social and economic justice' (Mohanty, 2003: 250). Trade unions in the North may have to abandon their to a large extent privileged viewpoint and look at global inequalities through a Southern, female perspective. It may well be that a new transformation of today's world order, and the dominant or hegemonic way of understanding this order, will not come from core workers in the early industrialised countries but from land-toilers and informal sector workers in the South. The role of unions and Left political movements in the North may then be that of a partner but not of a vanguard for others to follow.

Third, there is a strong potential for unions to develop cooperation with other social movements, most particularly but not exclusively in the sector of social reproduction. This requires an understanding that exploitation is not just class-based but has many faces, including oppressive structures and practices based on gender and ethnicity. Cases in this volume from the sector of social reproduction

clearly illustrate the importance of ideology, including a commitment to basic socio-economic and environmental rights and a critical approach to neo-liberal globalisation, as a link between unions and other social movements.

Fourth, while national trade union structures are no longer sufficient, globalisation should not be an argument to weaken existing national unions. The continuing importance of the state for the organisation of capital accumulation implies that the importance of the strength of national labour movements should not be underestimated. It would be a grave mistake to play off national unions and global ones against each other. Any weakening of the strength of unions on a national level will just enhance the position of employers and the political right. But globalisation provides a new and additional task, that of restraining competition between workers in the new global framework. Unions must now also meet and respond to an increasing danger of workers competing with each other over jobs on a global scale. The two tasks can reinforce each other. National trade unions will retain and develop their strength only if they are also able to develop their strategies versus capital at the global level.

Transnational worker solidarity will not develop according to any type of theoretical blue-print but in a practical step-by-step process. What is clear is that different notions of solidarity will be important in different circumstances and especially different economic sectors. Importantly, solidarity is not static. Identification with others, as a basis for a solidaristic relationship to others, can be both broadened and deepened through intensified human contacts. Robinson in Chapter 14 illustrates well the potentially exciting possibilities new technologies can offer. Solidarity is not automatic or static and it can only be the outcome of a process of concrete struggle. Chapter 8 on the strike at Novamed in Turkey outlines well, how initial problems were overcome, when individual workers got to know each other better during the strike. As Mohanty (2003: 7) points out, 'solidarity is always an achievement, the result of active struggle to construct the universal on the basis of particulars/differences'. Class consciousness is the outcome of struggle, not the automatic result of a particular location in the capitalist social relations of production (Thompson, 1968).

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